OhioBuys
Connecting Buyers and Suppliers

Working with Purchase Requisitions in OhioBuys

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Prepared for agency end-users responsible for creating, updating, reviewing, and approving purchase requisitions in OhioBuys.

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Overview: This learner guide covers the core activities related to creating, reviewing, approving, and managing purchase requisitions in OhioBuys. Information related to more specific scenarios, as well as information specific to your agency can be found in the Appendix and the Addendum respectively.

Processes Covered:

1) **Accessing OhioBuys:** OhioBuys can be accessed by logging in to MyOhio with your OH|ID and password. Once logged in, users have a variety of tools available for navigation including quick-access icons and a powerful universal search feature.

2) **Shopping:** OhioBuys contains a robust hosted catalog with items from a wide variety of Suppliers, as well as access to external punchout catalogs for some Suppliers. OhioBuys also allows users to add non-catalog, or freeform, line items to their shopping cart when required.

3) **Submitting and Updating Purchase Requisitions:** After identifying the items needed, users must complete and submit a purchase requisition within OhioBuys. Certain items, quantities, and payment methods require users to complete different fields. Once submitted, users can monitor the progress of their purchase or cancel as needed.

4) **Approving:** Most purchase requisitions will require approval from various agency approvers. Approvers will be responsible for reviewing different parts of the requisition, as their role requires. The system limits an approver's ability to edit depending on the role they have been granted.

Purchase Requisition Approval Path:

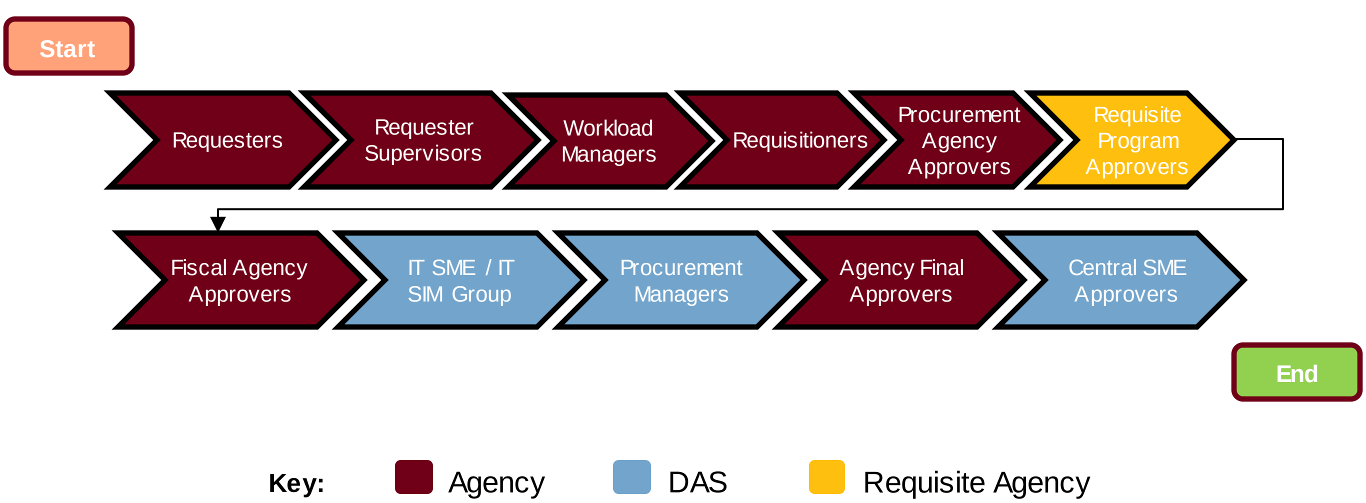
Approval Workflow

Most purchase requisitions in OhioBuys follow the approval workflow displayed at the bottom of this page. Once a purchase requisition has been submitted, it is automatically routed through the submitting user's unique agency approval path. At each step, the relevant approver examines the purchase requisition for compliance with agency, budgetary, or State policies, and approves or rejects the purchase requisition. Once a purchase requisition has received all the necessary approvals, a purchase order will be automatically created and an email notification will be sent to the Supplier.

Agency-Specific Variations

Each agency has the option to customize its agency approval workflow. Because of this, there may be variations to this process specific to your agency, such as including multiple approvers at a particular step. Agency approval rules are managed and maintained by Agency Administrators.

Approval Path



* IT SME Approval only required for IT purchases.
**Non IT SME approval occurs after agency final approval if the purchase is for Copy, Printing, Professional Services, or Fle et.

SUBMITTING PURCHASE REQUISITIONS

Topics

- Manage Profile Settings
- Purchase Requisition Item Types
- Purchasing Services in OhioBuys
- Submit a Hosted Catalog Purchase Requisitions
- Submit a Punchout Catalog Purchase Requisition
- Submit a Freeform Purchase Requisition
- Review and Update a Purchase Requisition

MANAGE PROFILE SETTINGS

Overview

- What's Covered: This section discusses how to manage your profile settings and establish defaults in OhioBuys
- Roles: All OhioBuys users
- Used When: Setting up an account for the first time in OhioBuys

OhioBuys

Manage Profile Settings

Step-by-Step Instructions for Managing Profile Settings

1 Log in to OhioBuys. From the Main Menu Navigation bar, click your profile name in the top-right corner of the page and select **My Profile** from the drop-down menu.

2 Your Profile Management page is displayed. On this page, you can update a variety of preferences and identifying information, including your default purchase requisition information. Scroll to the bottom of the page to find your Default settings.

3 ⚠ Updating your default purchase requisition information enables the auto-population of key form fields and accelerates the purchase requisition submission process.

Under Default settings, search and select your preferred inputs to the following fields:

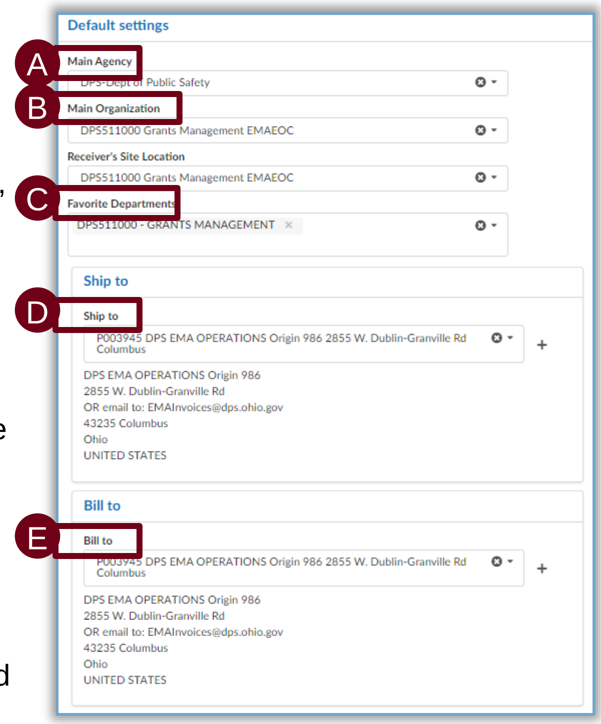
a) Search for and select your **Main Agency**, which is the agency you regularly submit requisitions for.

b) Search for and select your **Main Organization**, which is the division or group within a user's Agency that they regularly submit requisitions for.

c) Search for and select your **Favorite Departments**, which are the departments you regularly submit requisitions for. To add favorite departments, click **See All.** On the pop-up window, remove any filter and search for your favorite departments. Select your favorite departments from the search results.

d) Search for and select the **Ship to** address, which indicates the shipping address you would like your goods and/or services delivered to.

e) Search for and select the **Bill to** address, which indicates the billing address you would like the cost of your goods and/or services billed to.



4 Click the **Save** button at top of the screen to retain your default purchase requisition information for future transactions.

Step-by-Step Instructions for Managing Profile Settings

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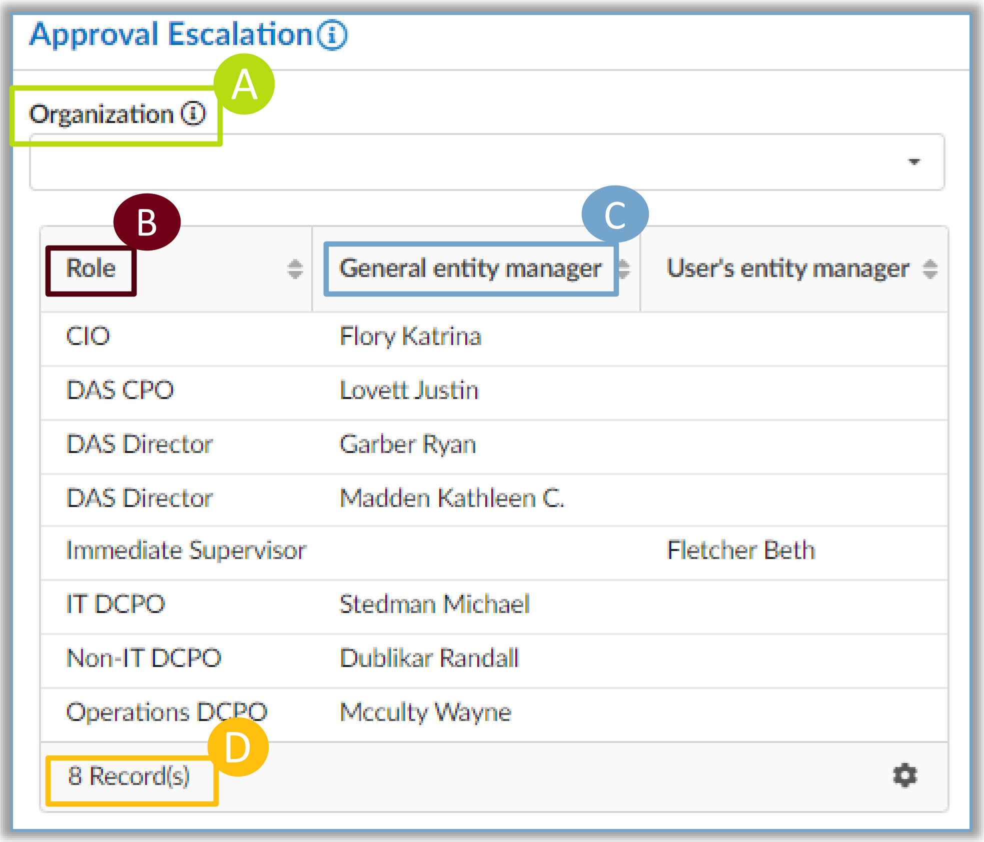
To review information related to the approval chain, such as the Immediate Supervisor and Chief Information Officer, refer to the **Approval Escalation** section on the **General Preferences** tab. This can be found above the Default Settings section. The roles assigned to these users influence the approval workflow routing.



a) The **Organization** field allows you to select an organization to filter by. To add an organization, click **See All**.

b) The **Role** shows the title or role of the user listed in the **General Entity Manager** column. To find a specific role, sort this column in alphabetical order by clicking the column title.

c) The **General Entity Manager** column shows the name of the user that occupies in the role.

d) The search results are organized onto one or multiple pages. To navigate through the various pages, select the page number at the bottom of the section.

Step-by-Step Instructions for Managing Profile Settings

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⚠ If you are out of the office for an extended period of time, your profile settings can be adjusted so that all future tasks are delegated to another user. This will allow the other user to take action on the task, while still allowing you to take action on the task.

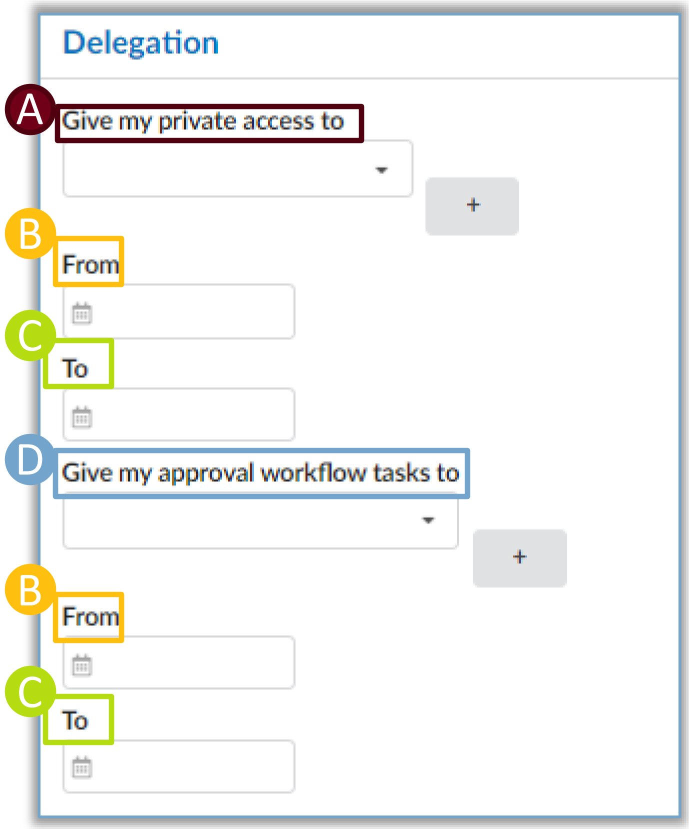
In the **Delegation** section on the **General Preferences** tab, complete all of the necessary fields:

a) Select the name of another user in the **Give my private access to** field.

b) Select a date to start delegating tasks in the **From** field.

c) Select a date to stop delegating tasks in the **To** field. If the delegation is supposed to occur indefinitely, then leave this field blank.

d) Select the name of another user in the **Give my approval workflow tasks to** field.



Step-by-Step Instructions for Managing Profile Settings

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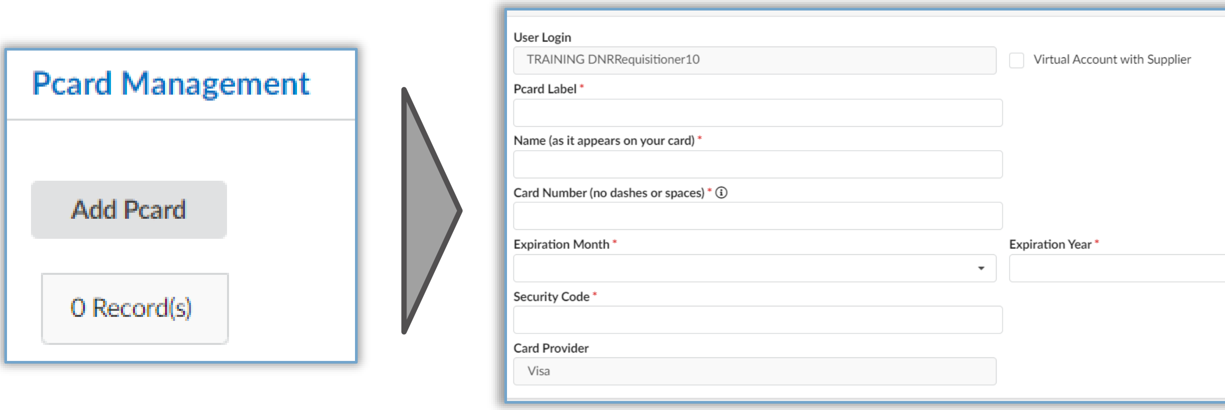
If you are a Pcard holder, your Pcard information should be entered in the **Pcard Management** section at the bottom of the page. Click **Add Pcard** and enter your card information.



When you are finished, click **Save & Close**.

⚠ To remove a Pcard from your profile, click the **Trash** (🗑) icon. Note that Pcard information cannot be modified, and if there are updates to a card it will need to be reentered

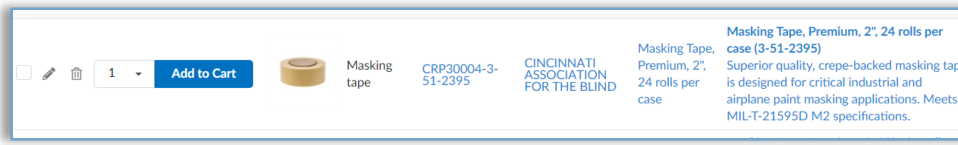
8

Click **Save** at the top of the page.

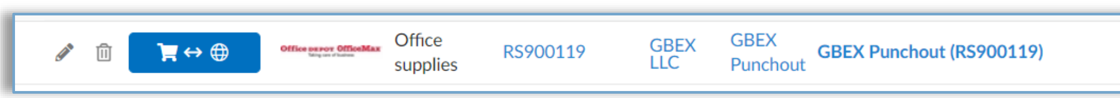
Purchase Requisition Item Types

There are three main categories of items that can be purchased within OhioBuys: Hosted Catalog Items, Punchout Catalog Items, and Freeform Items. How to purchase each type of item will be discussed in more detail later in this Learner Guide.

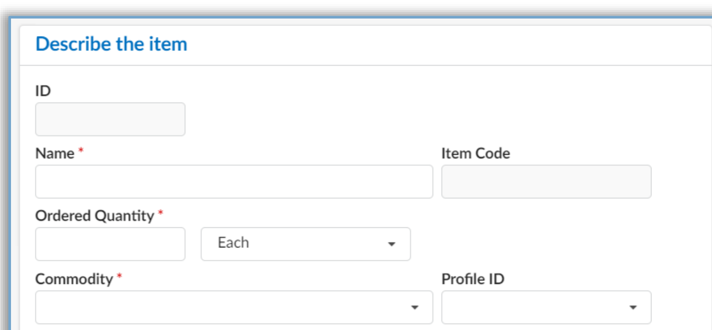
<u>Hosted Catalog Items</u>: Items that are hosted on catalogs within OhioBuys. The entire shopping process, from searching, to submitting, takes place in OhioBuys.



<u>Punchout Catalog Items</u>: Items that are hosted on a Supplier's external Website. For punchout items, you will first identify the Supplier you wish to order from, and then "punchout" to their website to shop for the item(s) you need. After adding the item(s) to your cart, you will be returned to OhioBuys to complete the checkout process.



<u>Freeform Items</u>: Items that do not exist in either a hosted or a punchout catalog. Freeform line items are created by the Requester and should only be created if no suitable alternative for the item in the purchase requisition exists in either a hosted or punchout catalog.



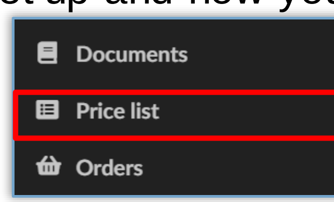
Starting the Purchase Requisition Process

To understand what type of purchase requisition items (e.g., hosted catalog items, punchout catalog items, freeform items) you should add to your cart as part of the purchase requisition process, we recommend first reviewing the contract you are trying to purchase from. Reviewing a contract in OhioBuys will allow you to see how a contract's catalog has been configured in OhioBuys.

To do this, log in to OhioBuys. From the Main Menu Navigation bar, click Contracts and then select Browse Contracts from the drop-down menu.

Under Advanced Search, users should first select a Supplier and then select a Contract Number when searching for a particular contract.

Once you find the contract you are looking for, open the contract with the **Pencil** ( ) icon and then navigate to the Price List tab. Reviewing this tab will allow to understand how the contract is set up and how you should proceed with purchasing from that contract.

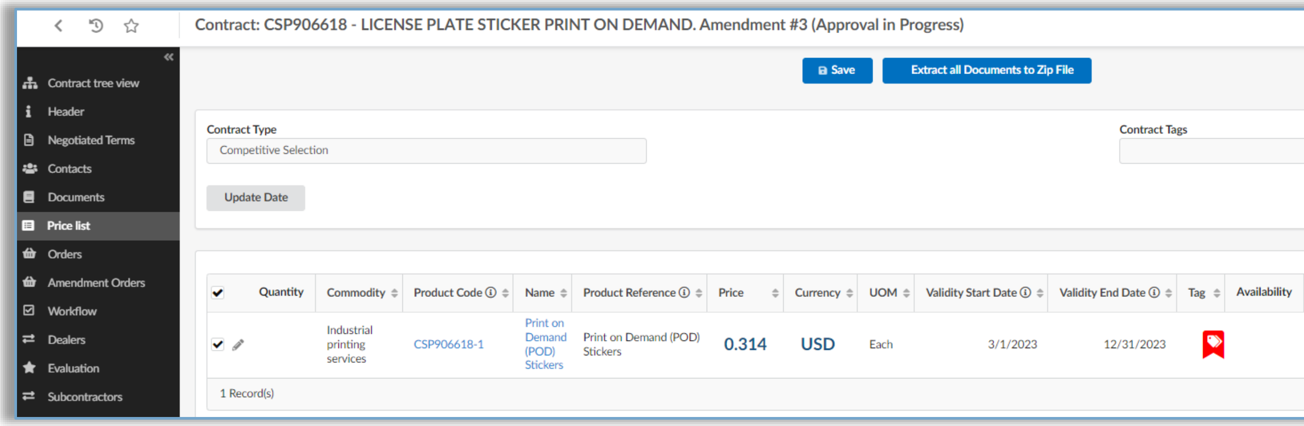


__Scenario 1: Contract With Hosted Catalog Items__

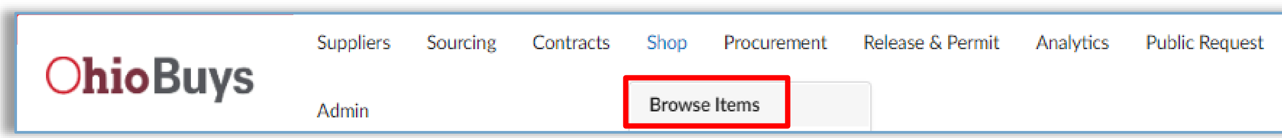
This scenario covers the instance when a user selects a contract that contains a list of hosted catalog items which are found in the Price List tab of that chosen contract. The user will then take the following steps to create a purchase requisition to submit for approval for the selected items.

1. Open a contract and navigate to the Price List tab. If the Price List tab contains a list of item(s) the contract has been set up with a hosted catalog.

Starting the Purchase Requisition Process

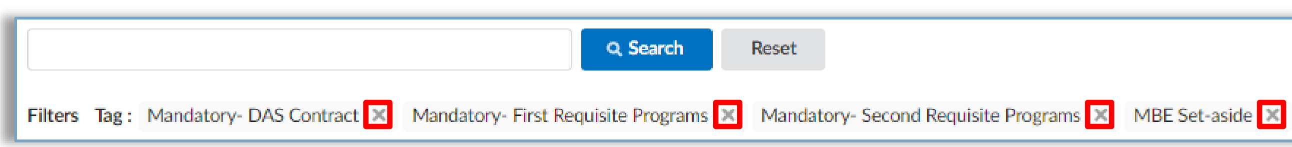


2. Navigate to the Browse Items page and search for the associated items.

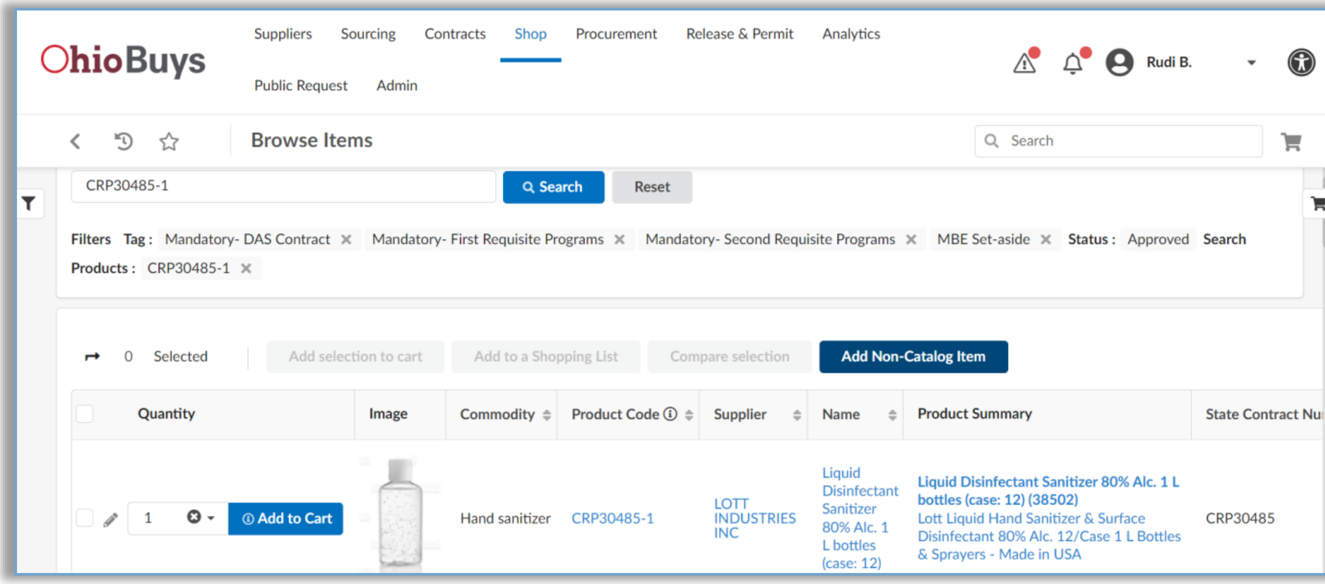


3. On the Browse Items page, users can search for specific contract numbers in the search bar and also have the option to remove filter tags by clicking on the **X** icon next to each filter.

⚠ Note: No items will be displayed if all filters are removed and no keywords are specified.



Starting the Purchase Requisition Process



4. Once you have the item you are looking for, update the quantity as needed and then click **Add to Cart**. Continuing adding other items to your cart as needed and then begin the checkout process.

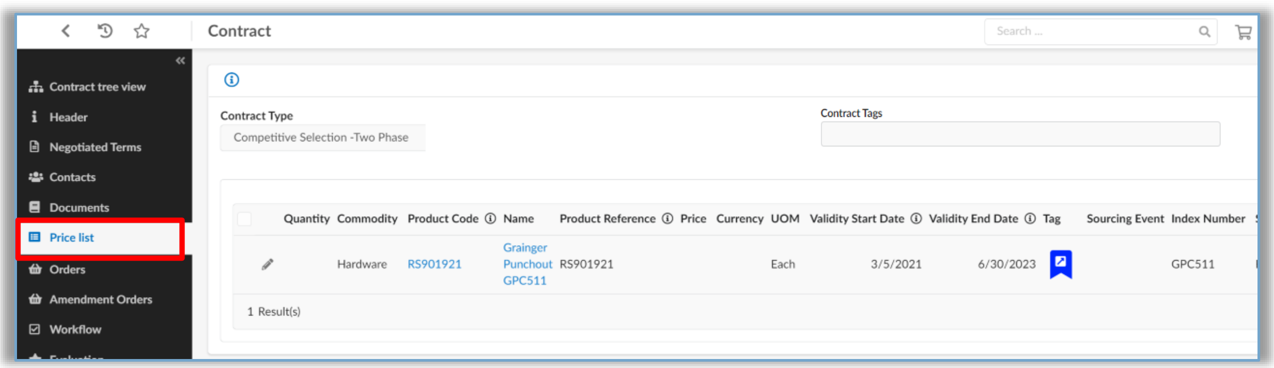
For additional details on how to submit a hosted catalog purchase requisition, click here.

Starting the Purchase Requisition Process

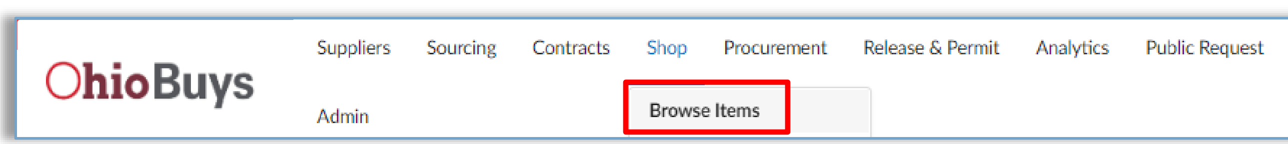
Scenario 2: Contract With a Punchout Catalog

This scenario covers the instance when a user selects a contract that contains a single item that references a punchout in the Price List tab of that chosen contract. The user will then take the following steps to launch the punchout and submit a purchase requisition for approval.

1. Open a contract and navigate to the Price List tab. If the Price List tab contains a single item that references a punchout, the contract has been set up with a punchout catalog.

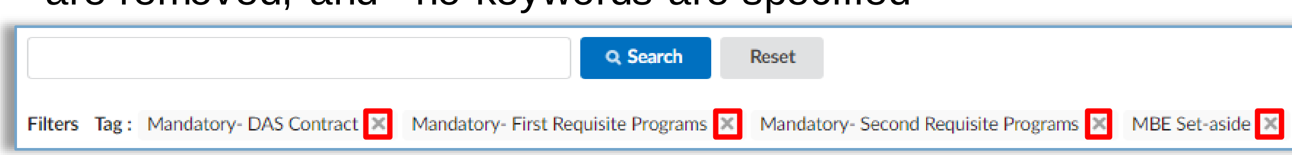


2. Navigate to the Browse Items page and search for the associated items.

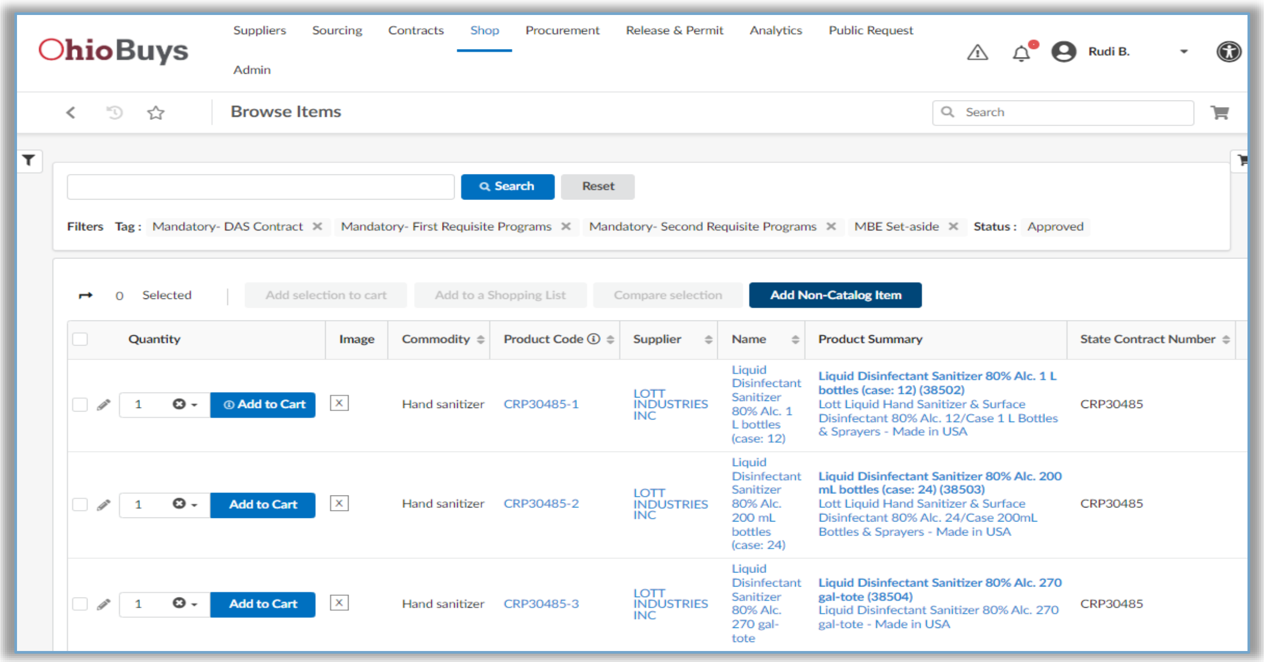


3. On the Browse Items page, users can search for specific contract numbers in the search bar and have the option to remove filter tags by clicking on the **X** icon next to each filter.

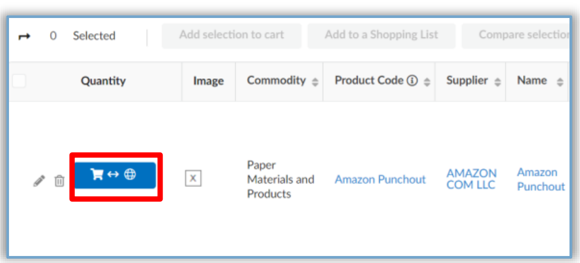
▲ Note: No items will be displayed if all filters are removed, and no keywords are specified



Starting the Purchase Requisition Process



4. Locate the relevant line item and then click the **Shop Online** icon to launch the punchout catalog.



5. Add the item(s) you need to purchase from the punchout catalog according to that Supplier's purchasing process.

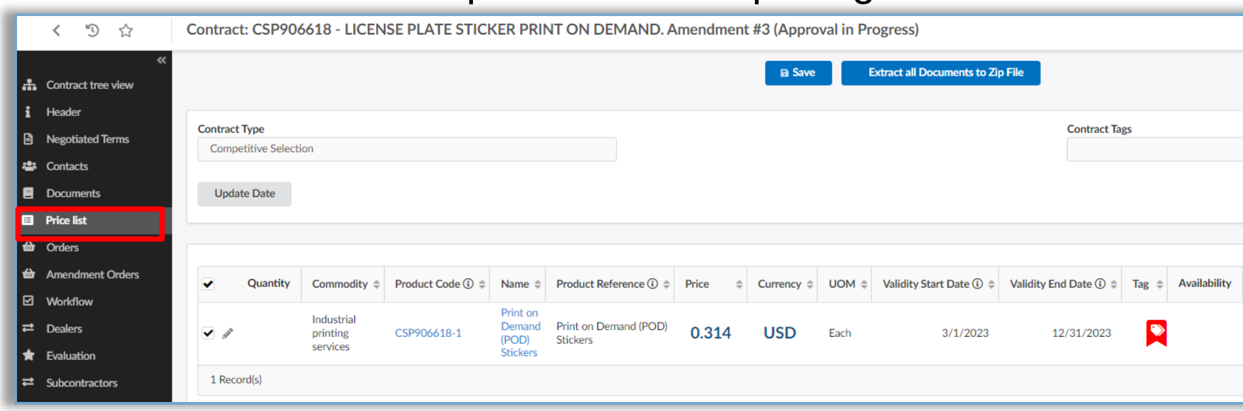
For additional details on how to submit a punchout catalog purchase requisition, click [here].

Starting the Purchase Requisition Process

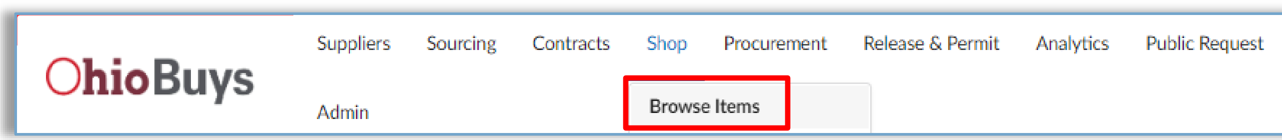
Scenario 3: Contract With Variable Pricing Line Items

This scenario covers the instance when a user selects a contract that contains item(s) close to $0.00 in the Price List tab of that chosen contract. The user will then take the following steps to update the purchase requisition accordingly and submit for approval.

1. Open a contract and navigate to the Price List tab. If the Price List tab contains item(s) with $0.00 or close to $0.00 line items, the contract has been set up with variable pricing line items.

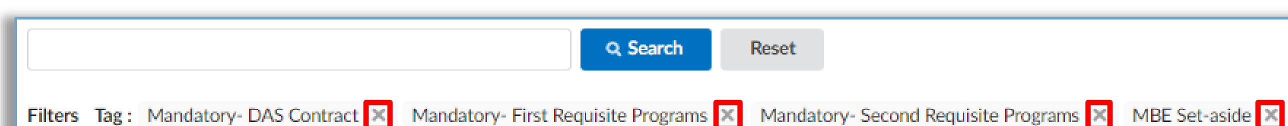


2. Navigate to the Browse Items page and search for the associated items.

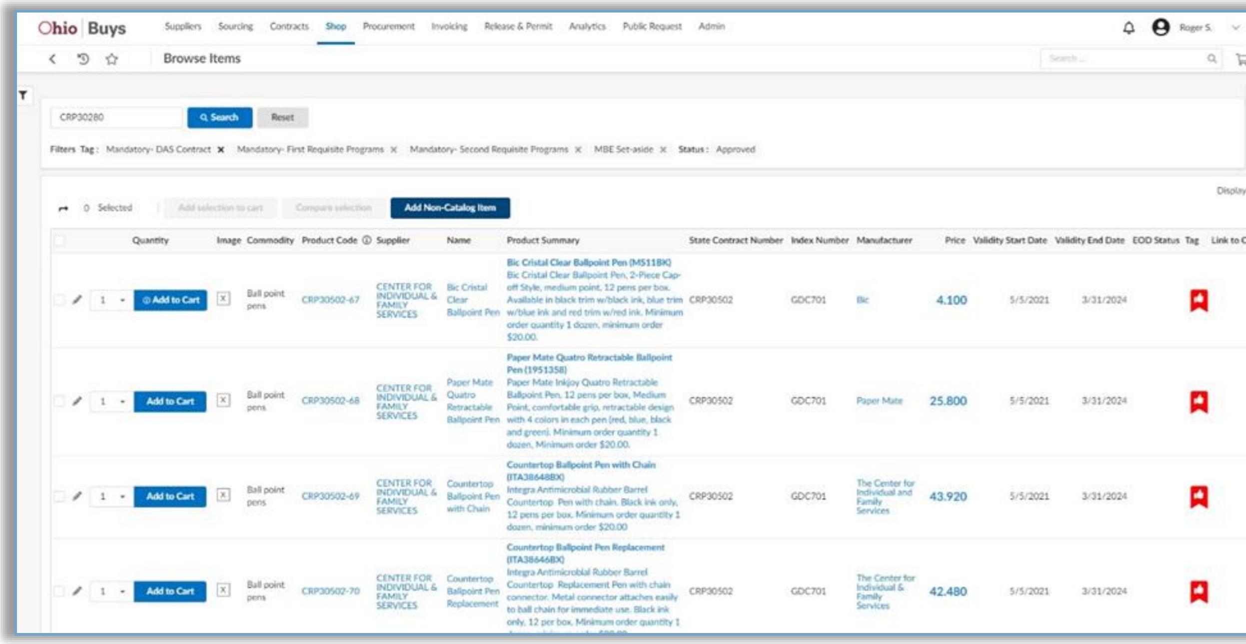


3. On the Browse Items page, users can search for specific contract numbers in the search bar and also have the option to remove filter tags by clicking on the **X** icon next to each filter.

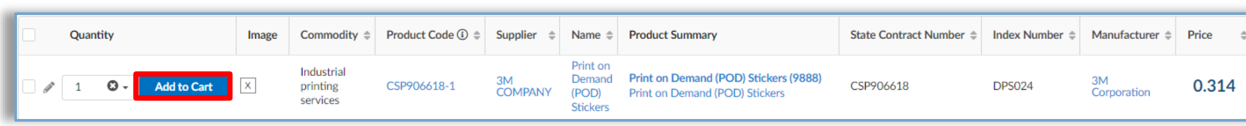
⚠ Note: No items will be displayed if all filters are removed and no keywords are specified



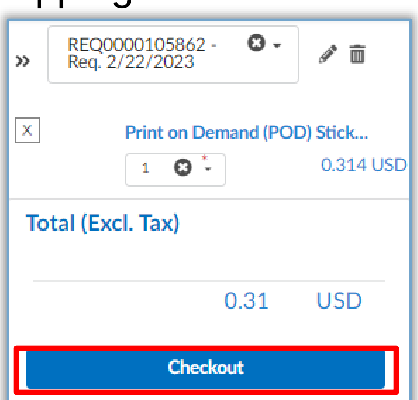
Starting the Purchase Requisition Process



4. A list of items appear that can be added to the purchase requisition. Click **Add to Cart** to add the generic line item to a purchase requisition.

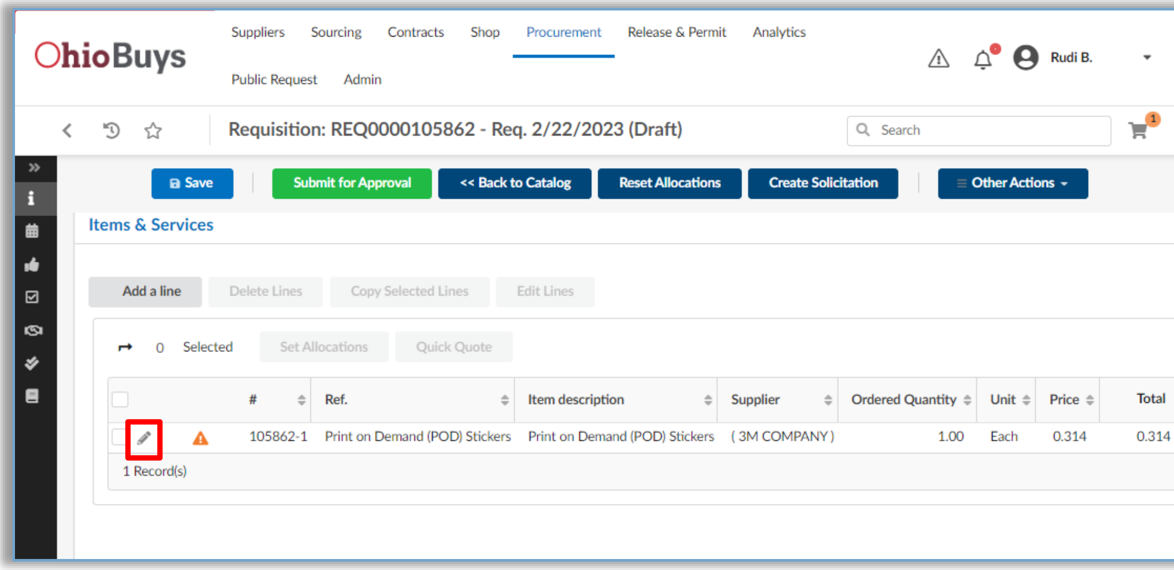


5. Click **Checkout** to be navigated to the purchase requisition page, where you can add shipping information and update the item.

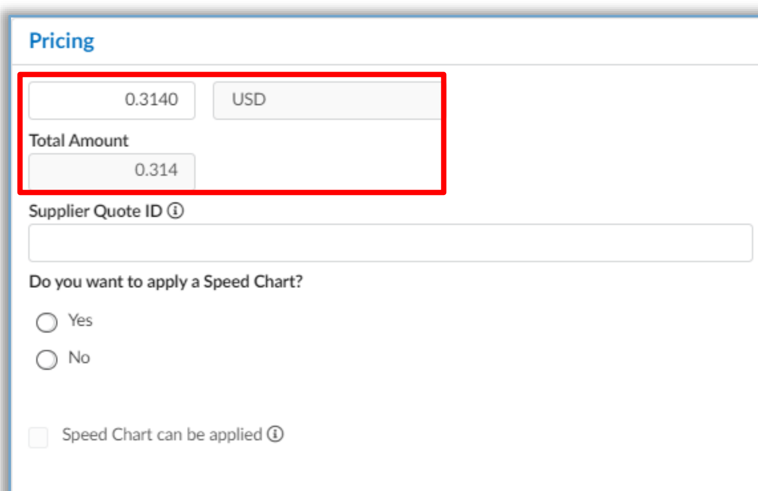


Starting the Purchase Requisition Process

6. Scroll down to the line item at the bottom of the purchase requisition and then click the **Pencil** ( ) icon next to the line item to update the price.



7. Update the pricing and enter the corresponding quote ID. In addition, users should attach the quote to the header of the PR as a justification document and may also need to update the item name.



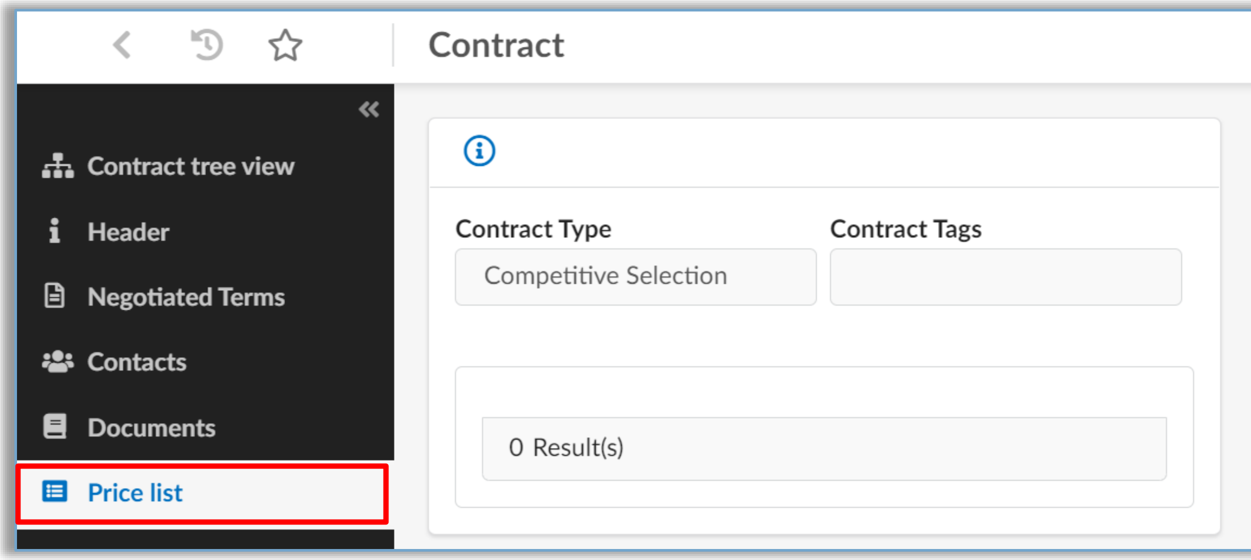
For additional details on how to submit a hosted catalog purchase requisition, click here.

Starting the Purchase Requisition Process

Scenario 4: Contract With No Items

This scenario covers the instance when a user selects a contract that has no items listed in the Price List tab of that chosen contract. The user will then need to create a freeform purchase requisition to submit for approval.

1. Open a contract and navigate to the Price List tab. If the Price List tab contains no items, the contract has no catalog and freeform items will need to entered to complete a purchase.



For more details on how to add freeform line items to a purchase requisition and complete the checkout process, click [here](#).

Purchasing Services in OhioBuys

Coordinating purchases of services with a Supplier prior to completing/submitting a requisition is a best practice. In addition to making sure the Supplier is able to provide the service, this coordination assures that the buyer and Supplier are on the same page with respect to costs, scope of work, deliverables, and performance timeframes.

When submitting a purchase requisition for services, it's important to attach any documentation describing and supporting the reasons for and specifics of the purchase. This can be a letterhead quote, but it may also be a SOW document from the Supplier or copies of emails between the buyer and the Supplier. Detailed instructions on how to insert attachments, and the different attachment types can be found in the respective sections for each of the purchase requisition types..

All of this information must be reviewed prior to authorizing the purchase and, as necessary, additional information can be requested from the buyer.

In addition, please note that the Delivery Date field for a line item will not be shown if the Product Type is changed from Product to Services.

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

⚠ OhioBuys should not be used to create requisitions for travel expenses.

Capital Purchases in OhioBuys

OhioBuys **is capable of processing capital purchases** and is the preferred platform through which State users should create these purchase requests.

Capitally-funded purchases that are not referencing a contract or release and permit issued by OFCC can be completed in OhioBuys.

However, OhioBuys should **not** be used for the creation of capital purchases that reference an Ohio Facilities Construction Commission (OFCC) contract. Additionally, OhioBuys should **not** be used in instances where a capital purchase requires the use of an OFCC-issued release and permit.

If the capital purchase is **in reference to an OFCC contract**, and/or **references an OFCC-issued release and permit**, users should **enter the purchase directly into OAKS**.

Otherwise, all other capital purchases can and should be entered into OhioBuys.

SUBMIT A GOODS AND/OR SERVICES REQUEST

Overview

- What's Covered: This section outlines the process for creating and submitting a request for goods and/or services in OhioBuys
- Roles: Requesters
- Used When: Purchasing items in OhioBuys

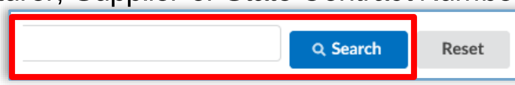
OhioBuys Submit a Goods and/or Services Request

Step-by-Step Instructions for Submitting a Goods and/or Services Request

1	Log in to OhioBuys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

2

The Browse Items page is displayed. On this page, you can enter a variety of search terms to search for goods and services. Enter search terms in the Keywords field (must be at least three characters) and then click **Search.** Search terms can include descriptors for the item such as item label description, item number, index number, manufacturer part number, etc. You can also search using additional filters such as Manufacturer, Supplier or State Contract Number by clicking the **More Filters** ( ) icon.



⚠ The search results on the Browse Items page are filtered to only show items that contain an item tag. An items tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In addition, item tags also indicate if an item has Dealers or is linked to an MBE Set-Aside contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms. If you remove all tags and do not have any search terms then no items will come up.

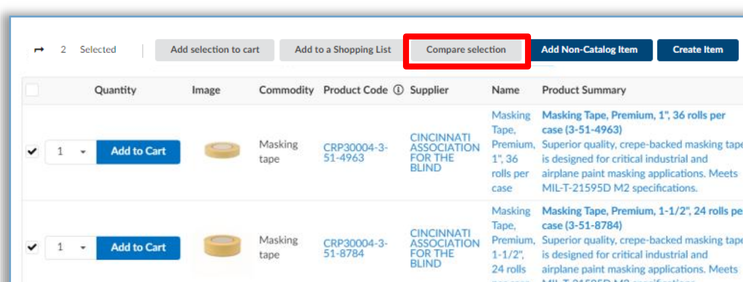
3

On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s). Once you have selected the checkbox(es), you can adjust the quantity by manually inputting the quantity.

⚠ You can also change the order in which columns are displayed in the search results by right-clicking on any column name. From the subsequent menu, drag and drop the order of the displayed columns to fit your needs.

⚠ To compare items side-by-side on the Browse Items page, click the **Checkbox** icons for the items you wish to compare and then click **Compare selection.**

⚠ If you cannot find the good or service you would like to request, you will need to click the Add Non-Catalog Item button. Refer to the *Submit a Freeform Purchase Requisition* section of this Learner Guide for details.



4	Once you have selected your item(s) and adjusted the quantity respectively, click **Add selection to cart**. Please note, in some scenarios, you may be prompted to select a feature (e.g., color, size, etc.) for the item you add to your cart.

Submit a Goods and/or Services Request

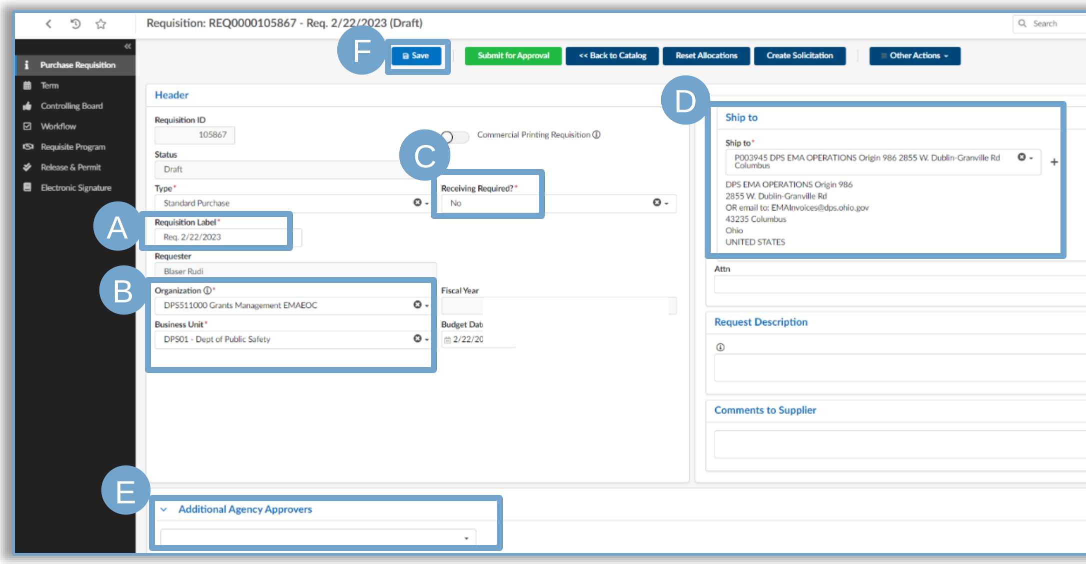
Step-by-Step Instructions for Submitting a Goods and/or Services Request

5

The specified item has been added to your shopping cart. To begin the checkout process, click **Checkout.**

6

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.



a) Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is *"Office Supplies JD"*).

b) Select your **Organization,** which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.

c) Indicate if you would like receiving to be required in OhioBuys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in OhioBuys in order for any Supplier submitted invoices to be processed.

d) Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '**+**' icon to provide a one-time delivery address.

⚠ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.

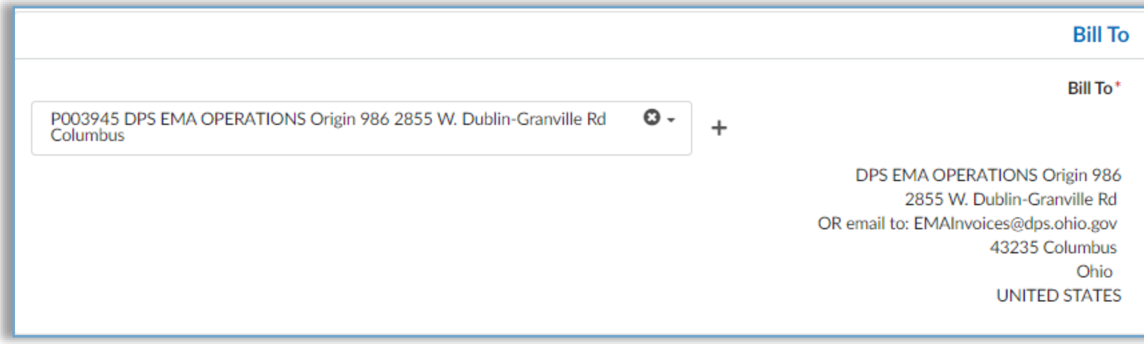
e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).

f) Click **Save.**

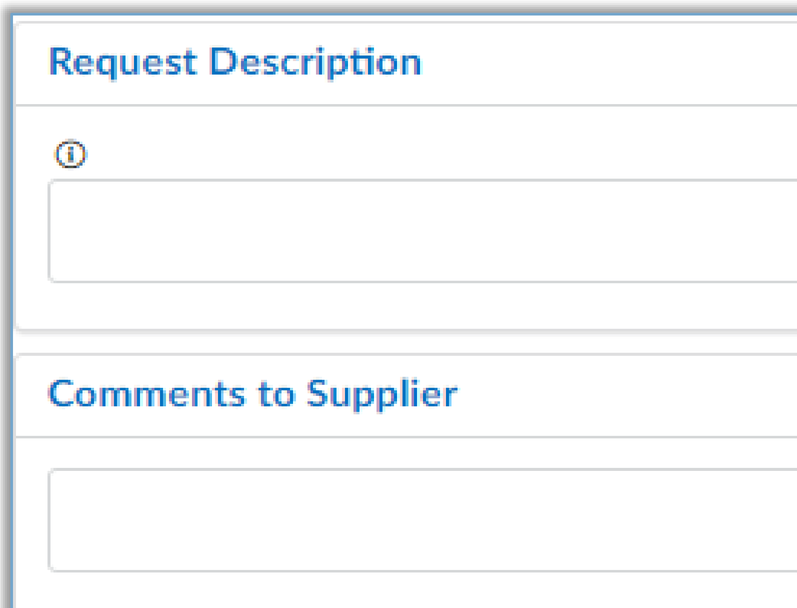
Step-by-Step Instructions for Submitting a Goods and/or Services Request

▲ If you are applying your own Pcard to your purchase requisition, please refer to Submit a Pcard Requisition beginning with step 5 on pg. 33 for instructions on how to complete the purchase requisition.

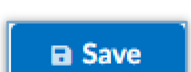
7 On the right side of the page, update your billing address in the **Bill To** field. To complete this field, begin typing the address and then select it when it appears in the drop-down menu.



8 Enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level.



9 Click the **Save** button.



Step-by-Step Instructions for Submitting a Goods and/or Services Request

10

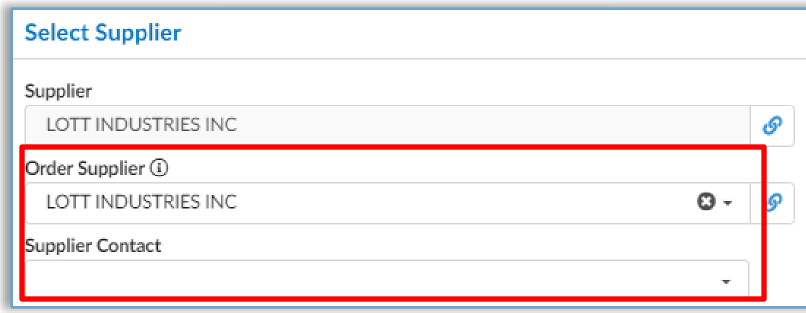
At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil ( )** icon next to each line item to make your mandatory and/or optional additions to specific fields.

For each line item, you must select an **Order Supplier**, which is the address of the Supplier that will fulfill your order. It is recommended that you select a **Supplier Contact** if one is available.

a) On the right side of the page, select an **Order Supplier** from the drop-down menu.

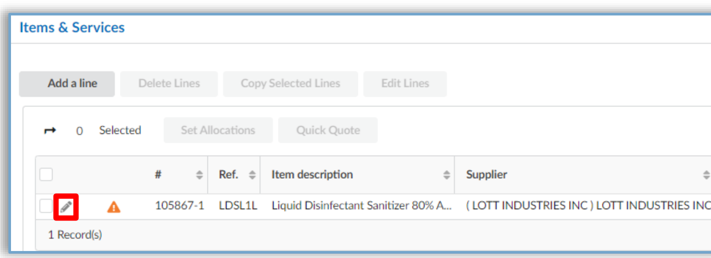
⚠ Note that when making purchases referencing certain contracts, the Order Supplier field will populate automatically

b) Select a **Supplier Contact** from the drop-down menu if one is available.



To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

1) Click the **Pencil** ( ) icon next to one of the items to open it.



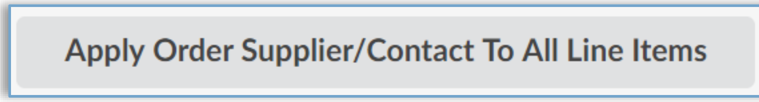
2) Select the **Order Supplier** and **Supplier Contact**.

3) If desired, select/update the **Delivery Date** and populate the **Attn** field.

Step-by-Step Instructions for Submitting a Goods and/or Services Request

4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

5) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.



11 Once you have finished making updates to the line item's information, click **Save & Close.**

12 Continue making updates to any remaining line items. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit for Approval.**

13 Your requisition has been submitted for review and has been sent to your supervisor for approval.

- A Requester cannot update a purchase requisition once it has been submitted unless the purchase requisition is rejected back to them. If you need to make updates after submitting a purchase requisition, add your requested changes in the Comment section on the **Workflow** tab and a Requisitioner can make updates on your behalf as they complete their review.
- If you would like to print the details of your requisition, click the **Print ( )** icon in the top right of the page.
- On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the requisition.

SUBMIT A PCARD PURCHASE REQUISITION

Overview

- What's Covered: This section outlines the process for creating and submitting a purchase requisition using a Pcard within OhioBuys
- Roles: Requesters, Requisitioners
- Used When: Purchasing items in OhioBuys with a Pcard

Submit a Pcard Purchase Requisition

Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

Per the Procurement Manual, the maximum transaction purchase amount using a Pcard is $5,000, unless otherwise approved by the OBM Payment Card Administrator. If a user attempts to create a Pcard transaction in OhioBuys above $5,000, the following blocking alert will be displayed: "Pcard Amount in excess of $5,000".

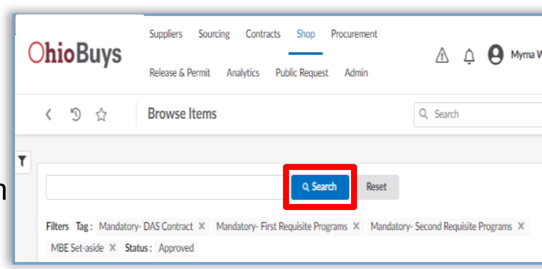
A Pcard purchase under the $5,000 maximum will not require justification documents nor supplier quotes. Additionally, if a Pcard purchase under $5,000 is submitted without adding any Additional Agency Approvers, it immediately becomes a Pcard order and is sent to the associated Supplier. Agencies should check with their Agency Admins to see when Additional Agency Approvers should be added.

OhioBuys Pcard orders are not sent to OAKS. If an agency would like to create an encumbrance that they intend to liquidate with a Pcard when invoices are submitted, a non-Pcard order may be created in OhioBuys (which will then integrate to OAKS). These POs must be set up with a Unit of Measure of "AMT"“ and a quantity of 1 (when “AMT” is selected as the Unit of Measure, the line quantity will automatically be set to 1). OhioBuys uses a non-blocking alert to make users aware of this when the Unit of Measure is "AMT" and reminds agencies to verify the price on the line item before completing their purchase requisition.“

If you are completing an After-the-Fact Pcard purchase be sure to indicate this in the comments section. Otherwise the processes is unchanged.

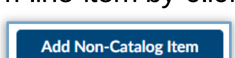
1 Log in to OhioBuys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

2 On the Browse Items page, you can enter a variety of search terms to search for goods and services. Enter search terms in the Keywords field (must be at least three characters) and then click **Search.**

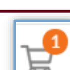


Search terms can include descriptors for the item such as item label description, item number, index number, manufacturer Part number, etc. You can also search using additional filters such as Manufacturer, Supplier or State Contract Number by clicking the **More Filters** ( ) icon.

If no suitable alternative for the item you need is available in either a hosted or punchout catalog, you can create a freeform line item by clicking the **Add Non-Catalog Item** button.



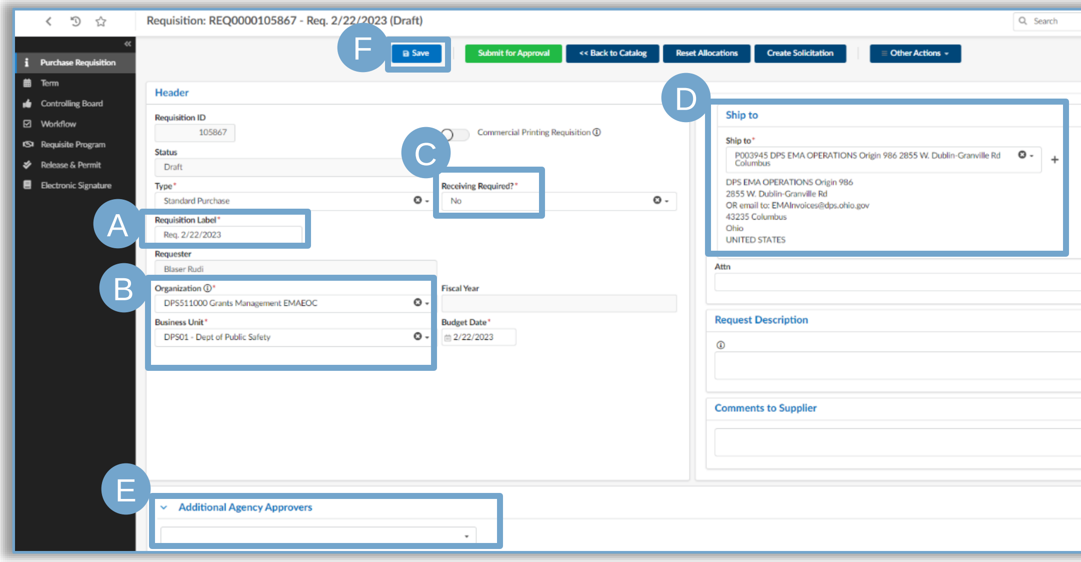
For more information on how to specifically purchase a hosted, punchout, or freeform line item, please refer to the next three chapters of this Learner Guide.

3 To begin the checkout process, click the **Checkout** icon. 

Submit a Pcard Purchase Requisition

Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

4



a) Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is *"Office Supplies JD"*).

b) Select your **Organization,** which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.

c) Indicate if you would like receiving to be required in OhioBuys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in OhioBuys in order for any Supplier submitted invoices to be processed.

d) Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '**+**' icon to provide a one-time delivery address.

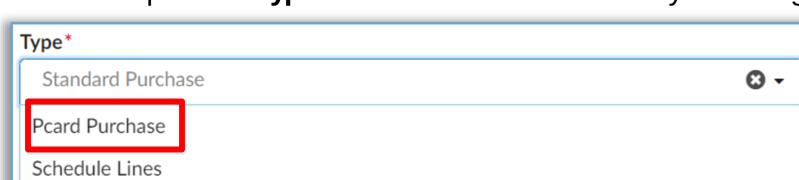
⚠ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these users will need to approve your purchase requisition before it is processed into a purchase order.

f) Click **Save.**

5

Update the Purchase Requisition **Type** field to **Pcard Purchase** by selecting it from the drop-down menu.



Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

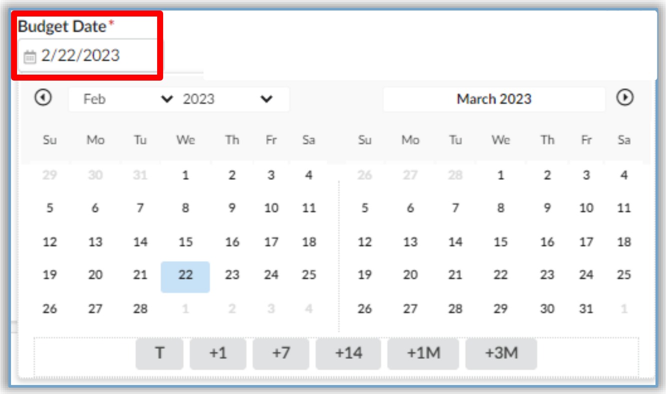
6

Click **Save.**

The Bill To address will automatically update to the Pcard billing address.

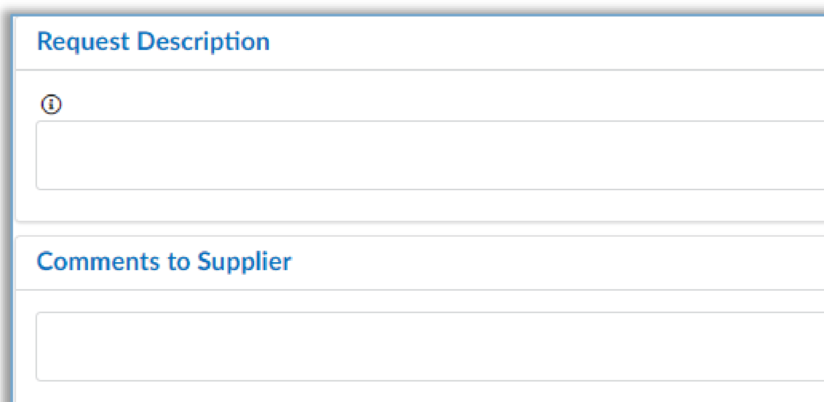
7

Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.



8

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.



9

Click **Save.**

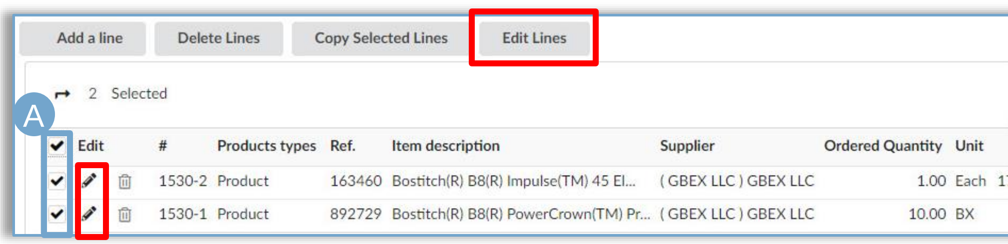
Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

10

At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil (✎)** icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., Supplier contact, ordered quantity, pricing information, etc.).

⚠ If you want to edit multiple line items at one time (e.g., mass select a delivery date), complete the following:

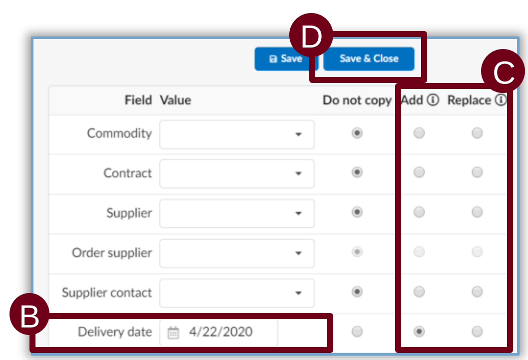
a) Click the **Individual Checkbox** icon next to the individual line items to select multiple individual line items or click the **Select All Checkbox** icon above the line items to mass edit all the line items and click the **Edit Lines** button.



b) To update the **Delivery Date**, select it from the **Delivery Date** field.

c) Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.

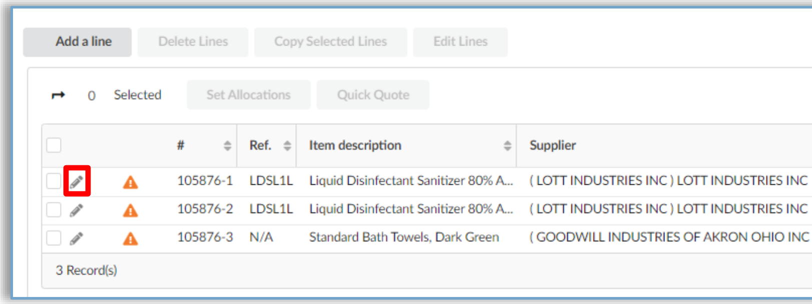
d) Click the **Save & Close** button.



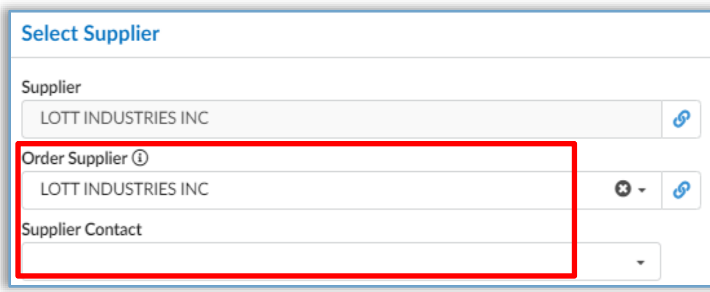
Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

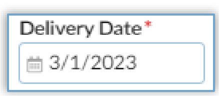
1) Click the **Pencil** (✎) icon next to one of the items to open it.

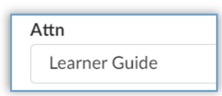


2) Select the **Order Supplier** and **Supplier Contact**.



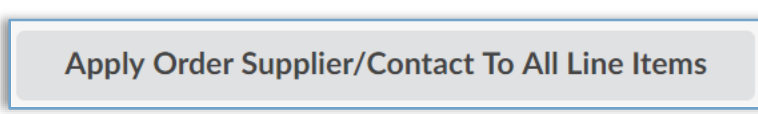
3) If desired, select/update the **Delivery Date** and populate the **Attn** field.





4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

5) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.



Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

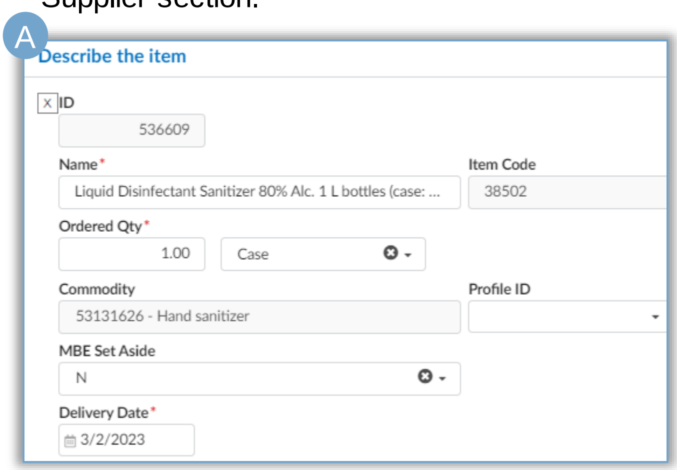
11

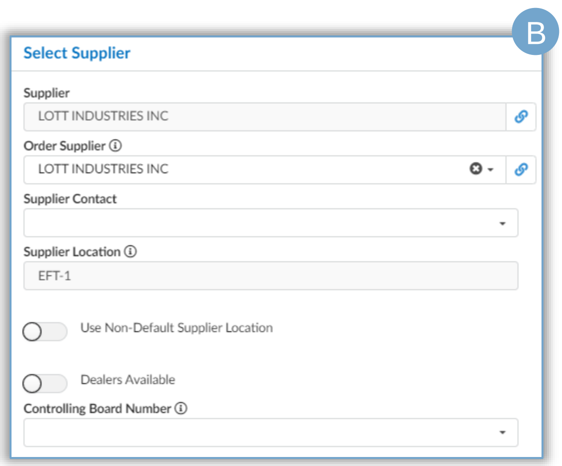
When reviewing the line item details for an individual line item, you can update information in the following sections:

a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.

b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. Note that when making purchases referencing certain contracts, the Order Supplier field will populate automatically. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.

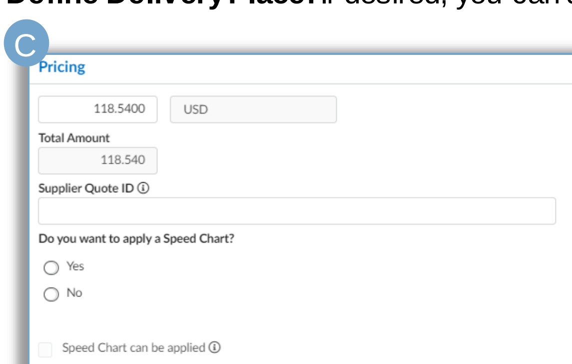
⚠ If a Controlling Board number is required and you have already received one for this purchase, enter it in the **Controlling Board Number** field at the bottom of the Select Supplier section.

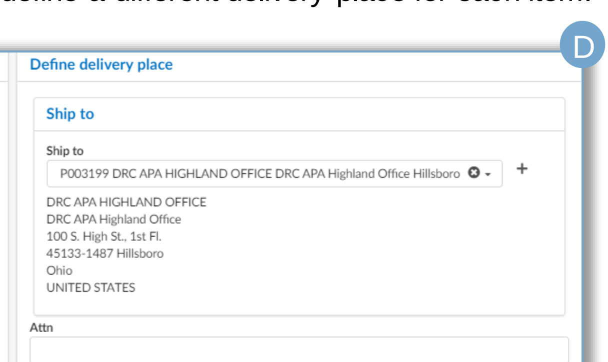




c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the *Creating and Awarding Quick Quotes* Learner Guide for instructions on how to conduct a quick quote.

d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.

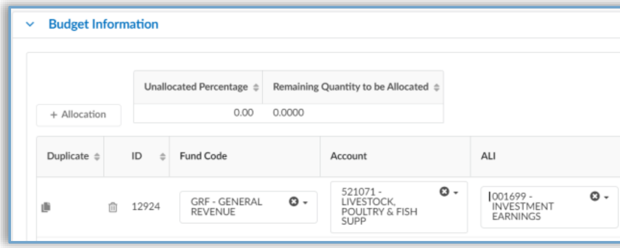




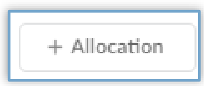
12

e) Budget Information: Expand this section to add chartfield information for the line item.

- Chartfield information is not required for Pcard purchases unless directed by your agency. Please consult with your agency admin to confirm whether or not your Pcard purchases require chartfield information.
- The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

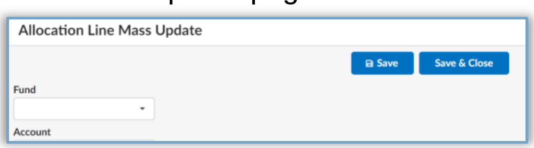


- Chartfield lines can be duplicated by clicking the **Copy** ( ) icon or deleted by clicking the **Trashcan** ( ) icon.
- When adding chartfield information, users can click **+ Allocation** to add an additional chartfield string.

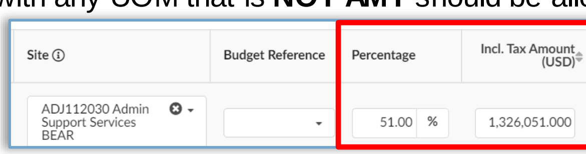


- Users can update fields in multiple chartfield strings at once by clicking the **Checkbox** ( ) Icon next to the strings they want to update and then clicking **Edit Lines**.

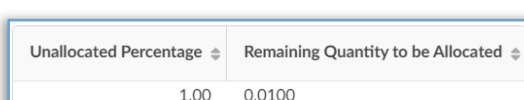
  This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.



- How a user allocates their chartfields will depend on the **UOM** selected for the line item. Users should only enter allocations for items with an UOM of **AMT** in the **Incl. Tax Amount (USD)** field. Items with any UOM that is **NOT AMT** should be allocated using the **Percentage** field.

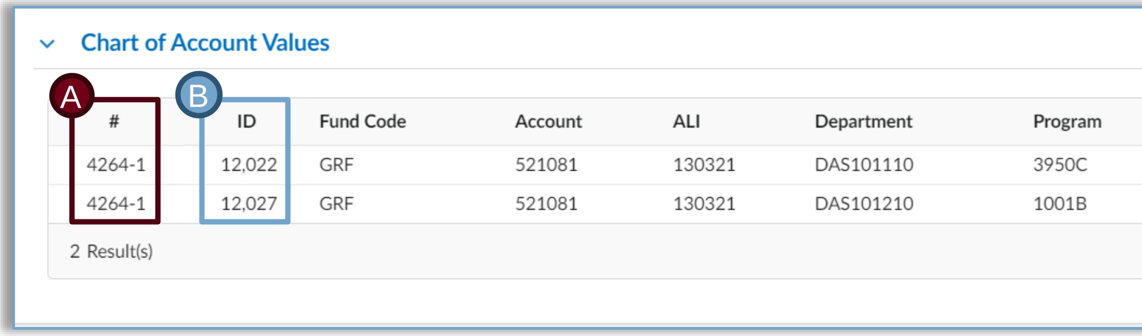


- OhioBuys allows percentage allocations with precision up to 2 decimal places, (e.g., 1.00%) and when allocating by amount, will round up or down based on percent to two decimal places. (e.g., 1.006% will round to 1.01% and adjust the amount accordingly)
- A table displaying the remaining percentage/quantity to be allocated is visible at the top of the **Budget Information** section.

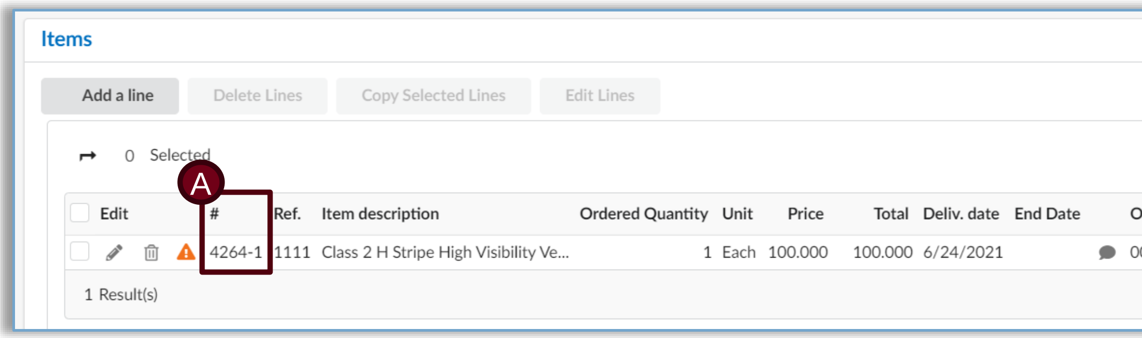


Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

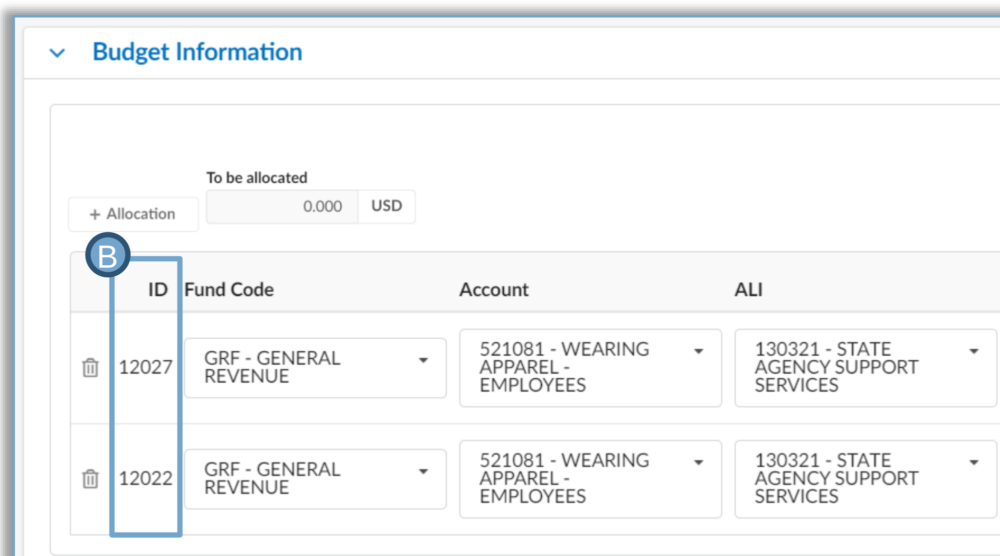
To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header. When reviewing the Chart of Account Values table, please note that:



a) The # column will correspond to the # column in the Items grid denoting different line items.



b) The **ID** column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.



Step-by-Step Instructions for Submitting a Pcard Purchase Requisition

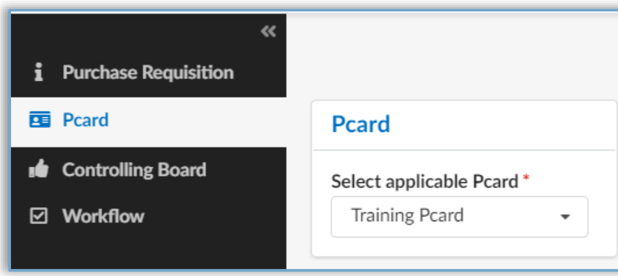
13

Once you are done making updates to the line item's information, click **Save & Close.**

14

Continue making updates to any remaining line items using Steps 12-13. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit for Approval.**

- ⚠ In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the *Creating and Awarding Quick Quotes* Learner Guide for details on the Quick Quote process.
- ⚠ If a user has multiple Pcards, they will need to select which one should be applied prior to submitting the requisition. The Pcard can be selected on the **Pcard** tab.



15

After your requisition has been submitted for review, you can check its approval status at any time.

- ⚠ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- ⚠ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- ⚠ If no Additional Approvers are added, and the purchase is below the Controlling Board Threshold, then a Pcard order will be automatically generated for the purchase requisition.
- ⚠ You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

SUBMIT A HOSTED CATALOG PURCHASE REQUISITION

Overview

- What's Covered: This section outlines the process for creating and submitting a purchase requisition for items contained in a hosted catalog within OhioBuys
- Roles: Requesters, Requisitioners
- Used When: Purchasing items that are available directly within OhioBuys

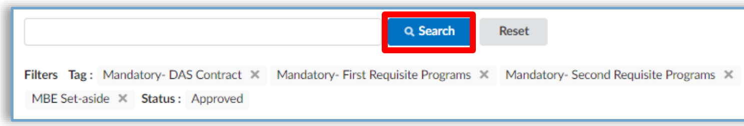
Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

1

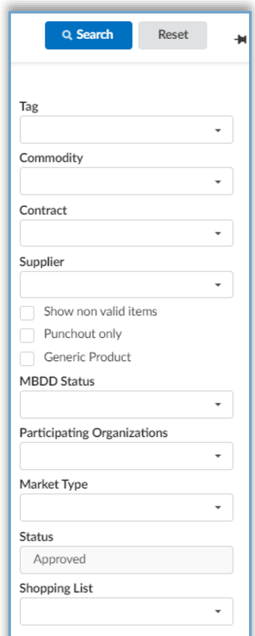
Log in to OhioBuys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

2

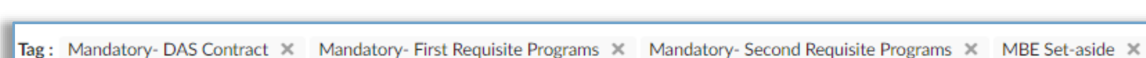
The Browse Items page is displayed. On this page, you can enter a variety of search terms to search for goods and services. Enter search terms in the Keywords field (must be at least three characters) and then click **Search.** Search terms can include descriptors for the item such as item label description, item number, index number, manufacturer part number, etc.



⚠ To filter your search by other categories, You can also search using additional filters such as Commodity, Supplier, or State Contract Number by clicking the **More Filters** ( ) icon and applying your filters in the appropriate fields.



By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An item tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In addition, item tags also indicate if an item is linked to an MBE Set-Aside contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms. Remove filters by clicking the **X** icon. No items will be displayed if all filters have been cleared and there are no keywords.

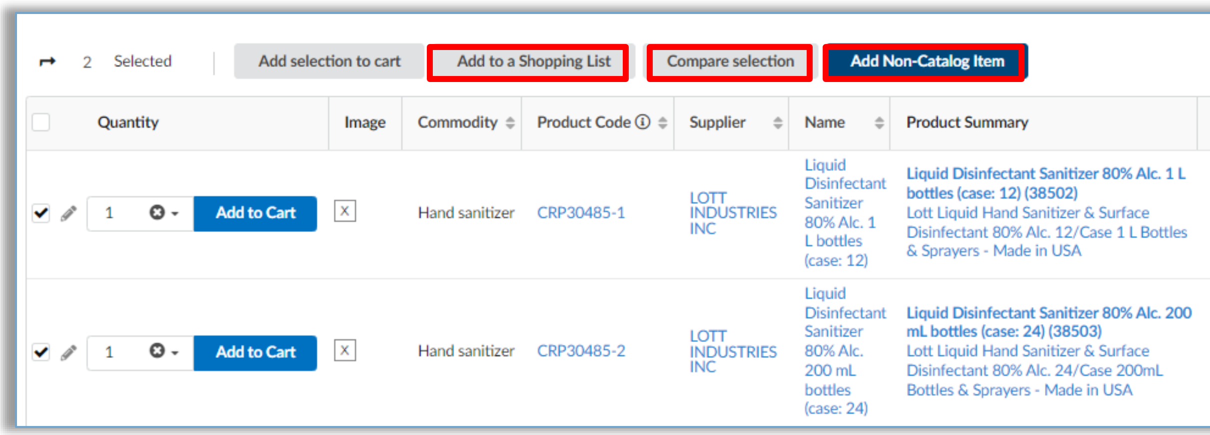


Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

3

On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s). Once you have selected the checkbox(es), you can adjust the quantity by either manually inputting the quantity or clicking the '**+**' or '**–**' symbol next to the shopping cart.

- ⚠ You can also change the order in which columns are displayed in the search results by right-clicking on any column name. From the subsequent menu, drag and drop the order of the displayed columns to fit your needs. (see General Navigation for more details)
- ⚠ To compare items side-by-side in OhioBuys, click the **Checkbox** icons for the items you wish to compare and then click **Compare selection.**
- ⚠ To shop for select items at a later date, click the **Checkbox** icons for the items you wish to save and then click **Add to a Shopping List.**
- ⚠ If you cannot find the good or service you would like to request, you will need to click the **Add a Non-catalog Item** button. Refer to the *Submit a Freeform Purchase Requisition* section of this Learner Guide for details.



4

Once you have selected your item(s) and adjusted quantities, click **Add selection to cart**. Please note that in some scenarios you may be prompted to select a feature (e.g., color, size, etc.) for your item(s).

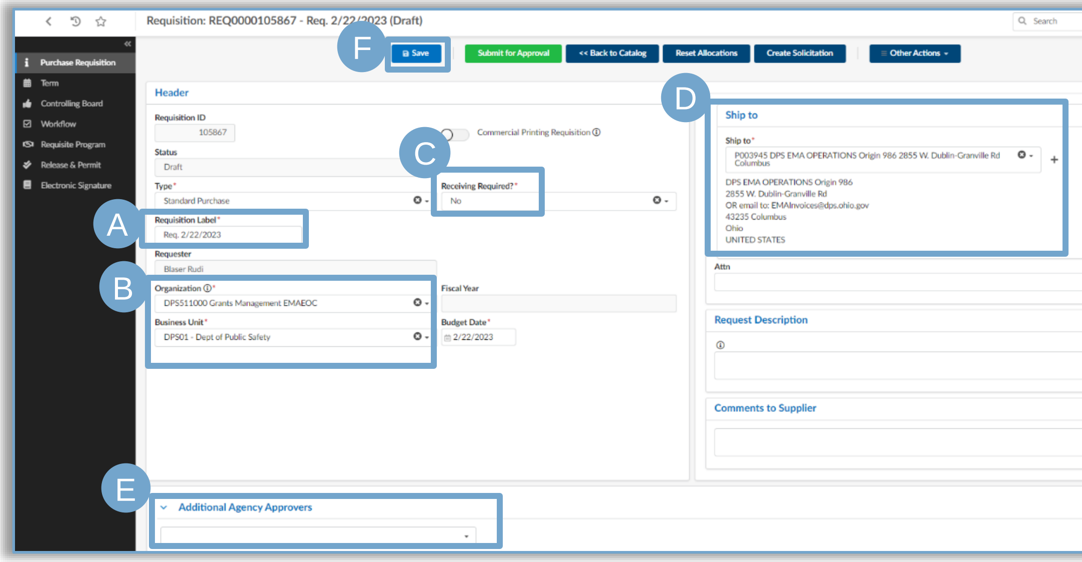
5

The specified item will be added to your shopping cart. To begin the checkout process, click **Checkout.**

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

6

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.



a) Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is *"Office Supplies JD"*).

b) Select your **Organization,** which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.

c) Indicate if you would like receiving to be required in OhioBuys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in OhioBuys in order for any Supplier submitted invoices to be processed.

d) Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '**+**' icon to provide a one-time delivery address.

⚠ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters), your Agency Procurement Approvers (for Requisitioners), or the requisition is processed into a purchase order (for Pcard purchases only).

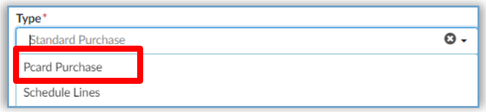
f) Click **Save.**

⚠ If you have the Requisitioner (On Behalf Of) role, you are able to update the **Requester** field if the purchase requisition is being created for another user. In order to do this, you must first select your **Organization** and then click **Save.** Requisitioners will only be able to select users that are within their scope.

Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

▲

If you would like to make this purchase a Pcard purchase, change the requisition **Type** by selecting **Pcard Purchase** from the drop-down menu, then click **Save**.



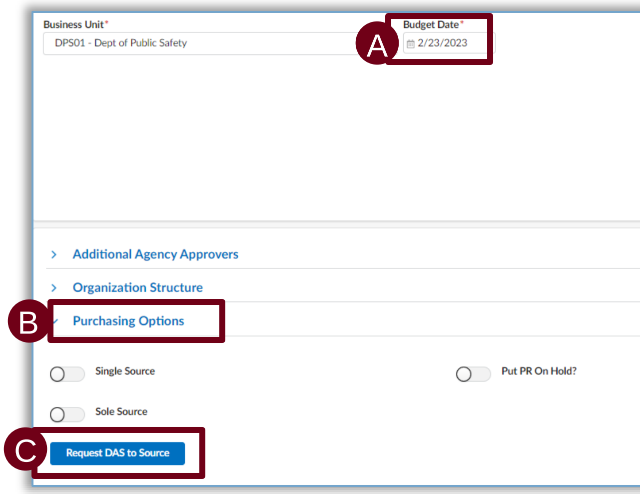
For more information on completing a Pcard purchase, please refer to [Submit a Pcard Purchase Requisition](#).

7

a) Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

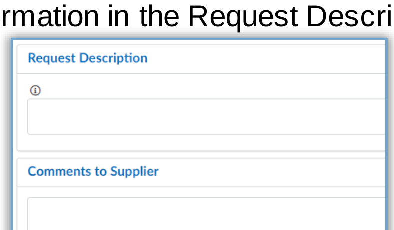
b) Expand the **Purchasing Options** section. From this section, you can indicate if a **DAS sourcing event** is required, as well as if the purchase requisition is **Single Source** or **Sole Source**. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered.

c) Use the displayed radio buttons to make your selections. If you select that a **DAS sourcing event** is required, click the **Request DAS to Source** button to complete the associated request form, which will then be routed to DAS.



8

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.



Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

9 Click the **Save** button.

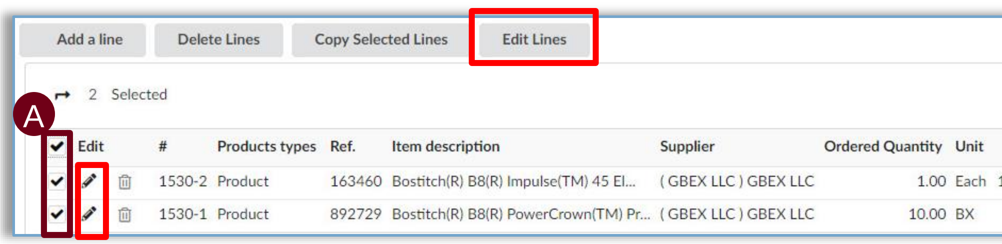
10 ⚠ If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

- Internal Attachment: Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, Supplier quotes) helpful for future reference or approvals.
- Justification Document: Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a Supplier that isn't a requisite procurement program.
- Supplier Document: Documentation sent to the Supplier with the purchase order.

11 At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil ( )** icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., Supplier contact, ordered quantity, chartfield information, etc.).

⚠ If you want to edit multiple line items at one time (e.g., mass select a delivery date), complete the following:

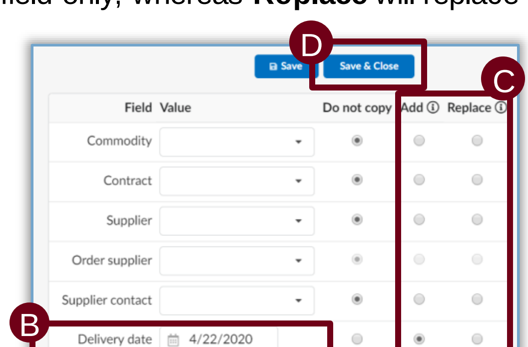
a) Click the **Individual Checkbox** icon next to the individual line items to select multiple individual line items or click the **Select All Checkbox** icon above the line items to mass edit all the line items and click the **Edit Lines** button.



b) To update the **Delivery Date**, select it from the **Delivery Date** field.

c) Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.

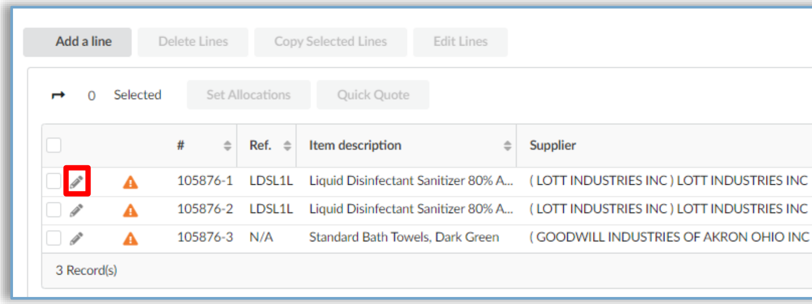
d) Click the **Save & Close** button.



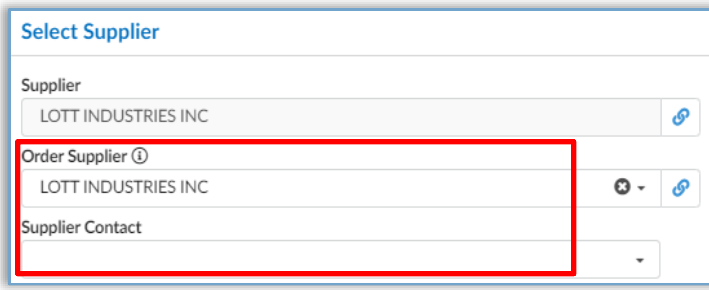
Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

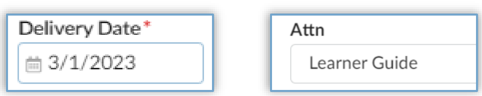
1) Click the **Pencil** (✎) icon next to one of the items to open it.



2) Select the **Order Supplier** and **Supplier Contact**.

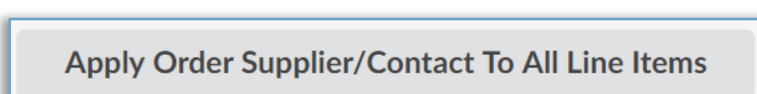


3) If desired, select/update the **Delivery Date** and populate the **Attn** field.



4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

5) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.



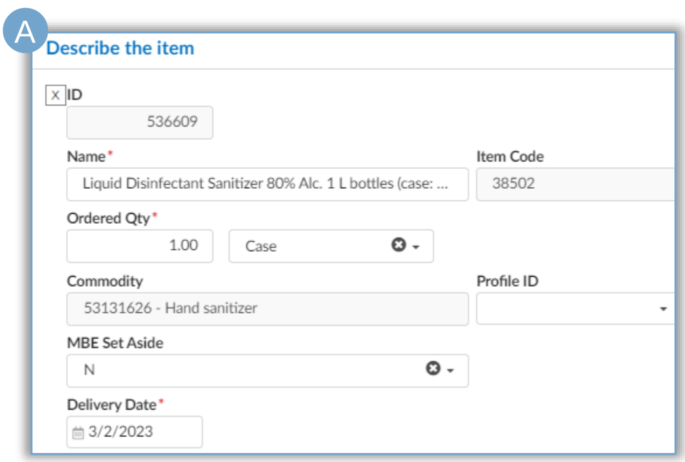
Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

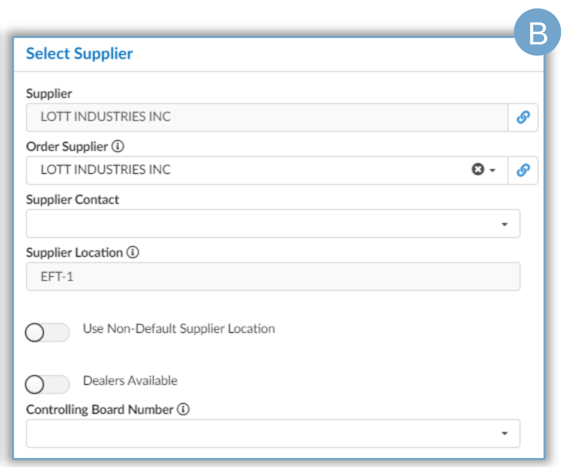
12

When reviewing the line item details for an individual line item, you can update information in the following sections:

a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.

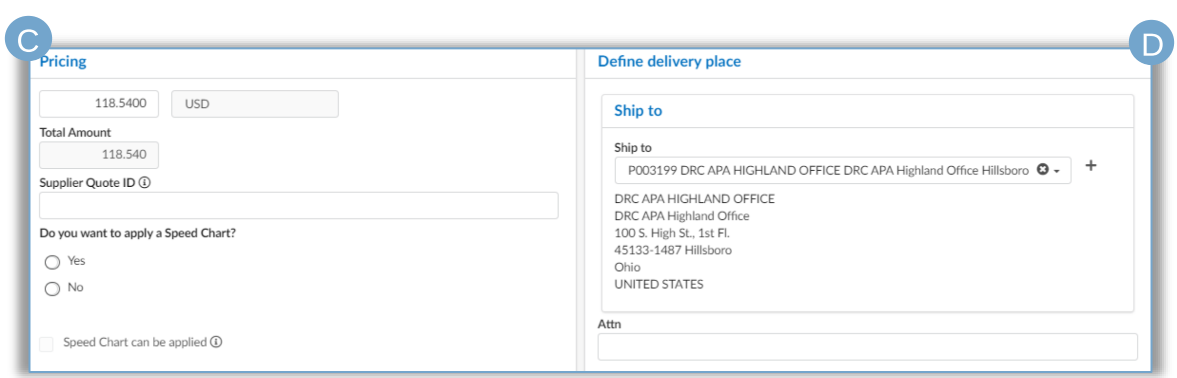
b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. Note that when making purchases referencing certain contracts, the Order Supplier field will populate automatically. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.





c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the *Creating and Awarding Quick Quotes* Learner Guide for instructions on how to conduct a quick quote.

d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.

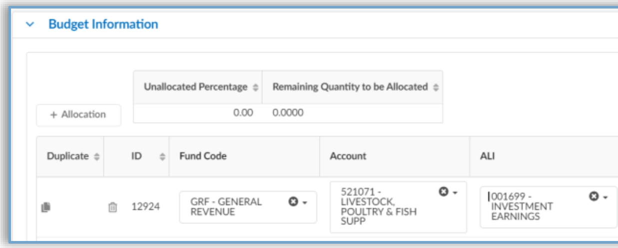


Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

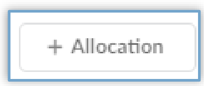
12

e) Budget Information: Expand this section to add chartfield information for the line item.

- ⚠ Chartfield information is not required for Pcard purchases unless directed by your agency. Please consult with your agency admin to confirm whether or not your Pcard purchases require chartfield information.
- ⚠ The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

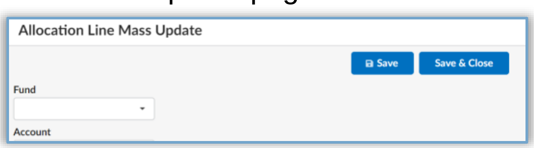


- ⚠ Chartfield lines can be duplicated by clicking the **Copy** ( ) icon or deleted by clicking the **Trashcan** ( ) icon.
- ⚠ When adding chartfield information, users can click **+ Allocation** to add an additional chartfield string.

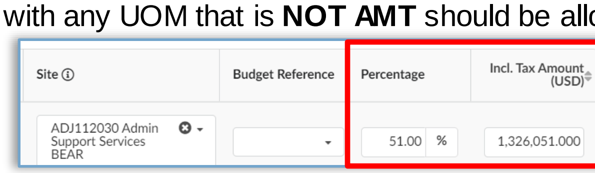


- ⚠ Users can update fields in multiple chartfield strings at once by clicking the **Checkbox** ( ) Icon next to the strings they want to update and then clicking **Edit Lines**.

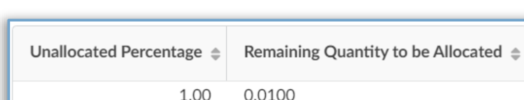
This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.



- ⚠ How a user allocates their chartfields will depend on the **UOM** selected for the line item. Users should only enter allocations for items with an UOM of **AMT** in the **Incl. Tax Amount (USD)** field. Items with any UOM that is **NOT AMT** should be allocated using the **Percentage** field.

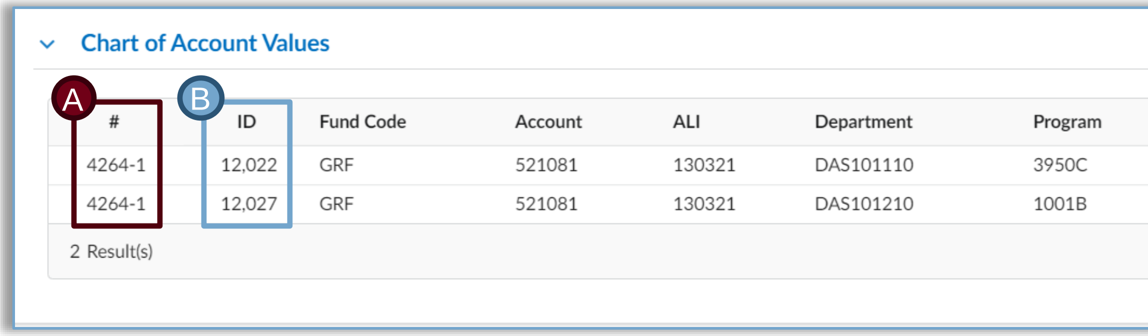


- ⚠ OhioBuys allows percentage allocations with precision up to 2 decimal places, (e.g., 1.00%) and when allocating by amount, will round up or down based on percent to two decimal places. (e.g., 1.006% will round to 1.01% and adjust the amount accordingly)
- ⚠ A table displaying the remaining percentage/quantity to be allocated is visible at the top of the **Budget Information** section.

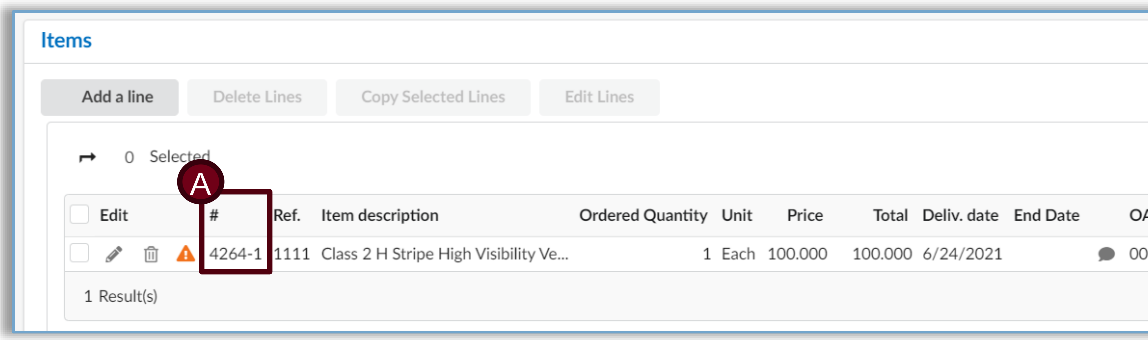


Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

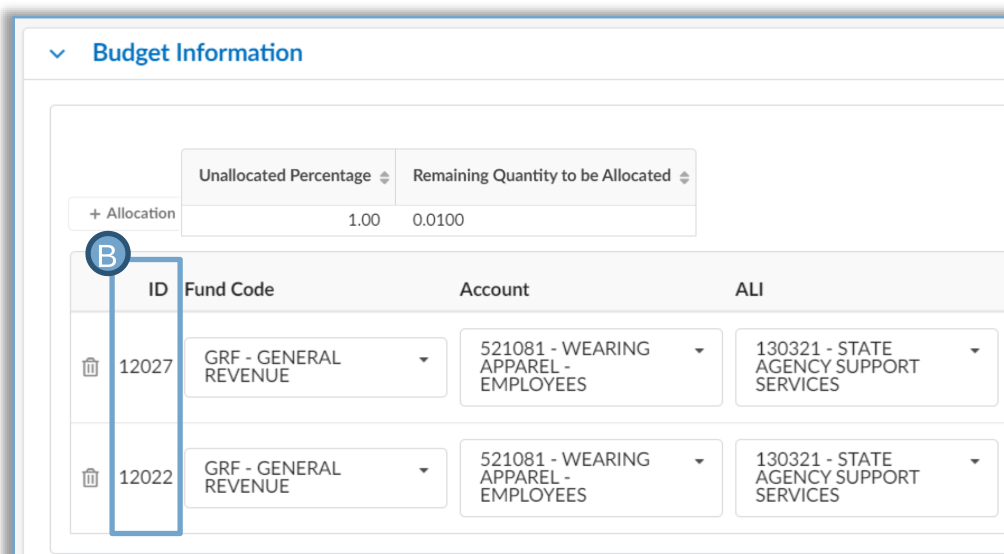
To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header. When reviewing the Chart of Account Values table, please note that:



a) The # column will correspond to the # column in the Items grid denoting different line items.



b) The **ID** column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.



Step-by-Step Instructions for Submitting a Hosted Catalog Purchase Requisition

13 Once you are done making updates to the line item's information, click **Save & Close.**

Save & Close

14 Continue making updates to any remaining line items using Steps 12-13. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit for Approval.**

Submit for Approval

- In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the *Creating and Awarding Quick Quotes* Learner Guide for details on the Quick Quote process.

15 After your requisition has been submitted for review, you can check its approval status at any time.

- If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

Workflow Main Approvals

Purchase Requisition	Activity	Approval Type	Approved	Name	Order	Performed by	Validated on (UTC-5)	ID	Agency
Req. 2/23/2023	Procurement	37		Chapa Jarrod	10			1629466	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37		Whalen Kelli	10			1629467	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37		Dripps Jeffrey	10			1629470	DPS-Dept of Public Safety

3 Record(s)

- On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

SUBMIT A PUNCHOUT CATALOG PURCHASE REQUISITION

Overview

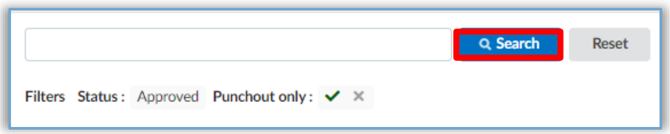
- What's Covered: This section discusses the process for creating and submitting a purchase requisition for items from a punchout catalog
- Roles: Requesters, Requisitioners
- Used When: Creating a purchase requisition from a Supplier who uses a punchout catalog

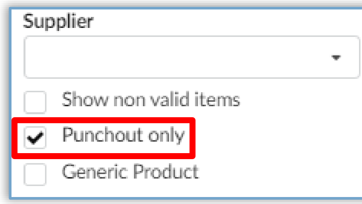
Submit a Punchout Catalog Purchase Requisition

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

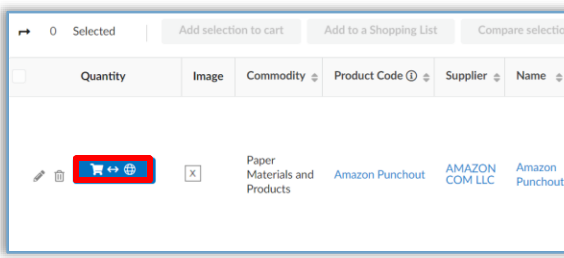
1 Log in to OhioBuys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

2 The Browse Items page is displayed. To quickly find a Supplier's punchout catalog, enter and select name of the Supplier in the **Supplier** field and click **Search.** By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An item tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms. If you remove all tags and do not have any search terms then no items will come up. To view only punchout catalogs, Click the **More Filters** ( ) icon and select the **Punchout only** checkbox.





3 Punchout catalog items will show a **Shop Online** icon in the Quantity column instead of an **Add to Cart** button. Click the **Shop Online** icon to view the Supplier's punchout catalog.



⚠ Hosted and punchout catalog items' prices may change as updates are reviewed and approved by Contract Analysts. Punchout catalog item pricing may change at any time without approval of a Contract Analyst unless the item is a Market Basket Item. Market Basket Items are listed in a contract's terms and maintain firm pricing for one year from the contract's inception.

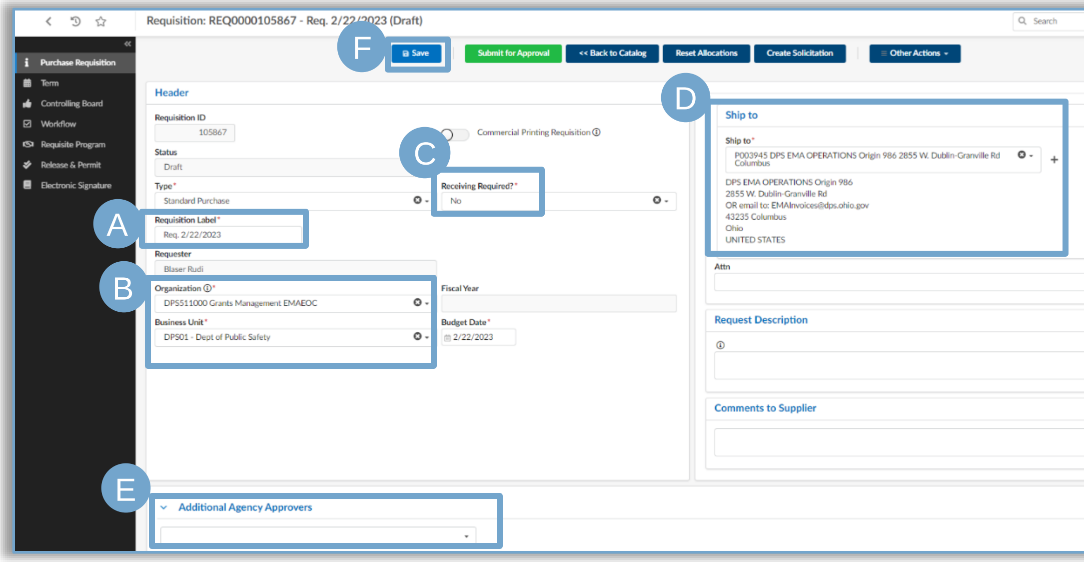
4 The Supplier's punchout catalog is displayed. Search for and add the item(s) you would like to purchase. In order to punch back into OhioBuys and transfer your shopping cart over, click **Check Out** or **Submit Order** (the wording of the button will vary depending on the Supplier) on the Supplier's website. After you submit an order, a notification will typically display thanking you for visiting the Supplier's website. The notification will inform you that your items will be transferred back to OhioBuys.

5 The items from the Supplier's punchout catalog have been added to your shopping cart. To begin the checkout process, select the shopping cart ( ) icon to expand the item management window pane and click **Checkout.**

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

6

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.



a) Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is *"Office Supplies JD"*).

b) Select your **Organization,** which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.

c) Indicate if you would like receiving to be required in OhioBuys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in OhioBuys in order for any Supplier submitted invoices to be processed.

d) Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '**+**' icon to provide a one-time delivery address.

⚠ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters), your Agency Procurement Approvers (for Requisitioners), or the requisition is processed into a purchase order (for Pcard purchases only).

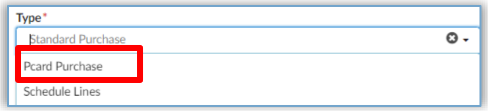
f) Click **Save.**

⚠ If you have the Requisitioner (On Behalf Of) role, you are able to update the **Requester** field if the purchase requisition is being created for another user. In order to do this, you must first select your **Organization** and then click **Save.** Requisitioners will only be able to select users that are within their scope.

Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

▲

If you would like to make this purchase a Pcard purchase, change the requisition **Type** by selecting **Pcard Purchase** from the drop-down menu, then click **Save**.



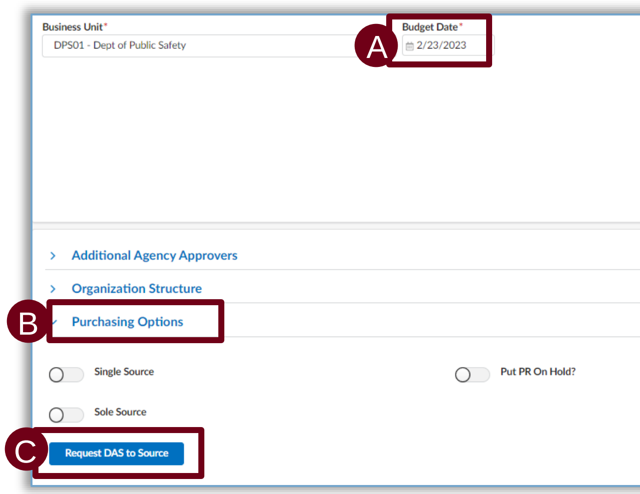
For more information on completing a Pcard purchase, please refer to [Submit a Pcard Purchase Requisition](#).

7

a) Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

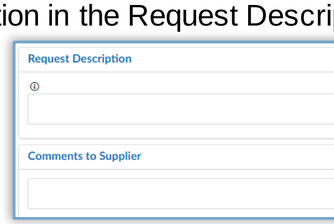
b) Expand the **Purchasing Options** section. From this section, you can indicate if a **DAS sourcing event** is required, as well as if the purchase requisition is **Single Source** or **Sole Source**. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered.

c) Use the displayed radio buttons to make your selections. If you select that a **DAS sourcing event** is required, click the **Request DAS to Source** button to complete the associated request form.



8

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.



Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

9 Click the **Save** button.

10 ⚠ If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

- Internal Attachment: Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, Supplier quotes) helpful for future reference or approvals.
- Justification Document: Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a Supplier that isn't a requisite procurement program.
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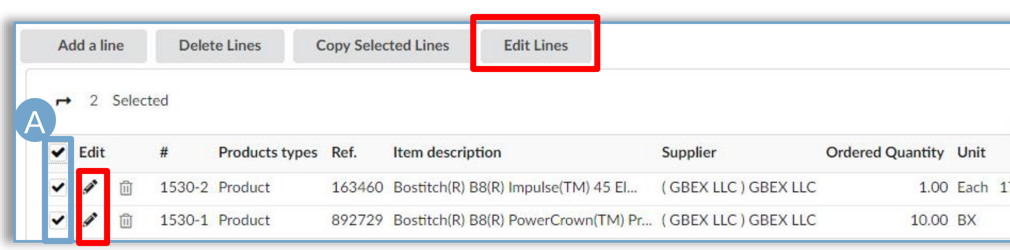
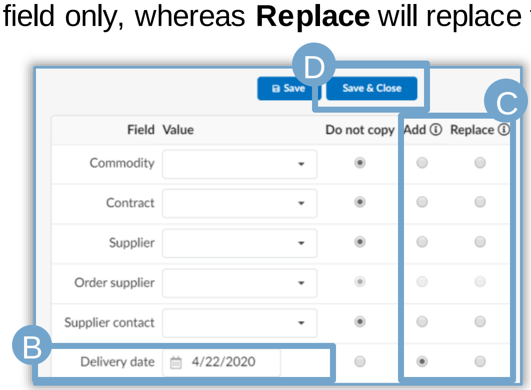
a) Click the **Individual Checkbox** icon next to the individual line items to select multiple individual line items or click the **Select All Checkbox** icon above the line items to mass edit all the line items and click the **Edit Lines** button.



b) To update the **Delivery Date**, select it from the **Delivery Date** field.

c) Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.

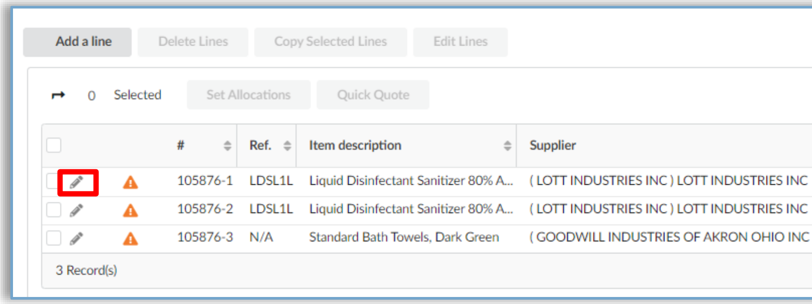
d) Click the **Save & Close** button.



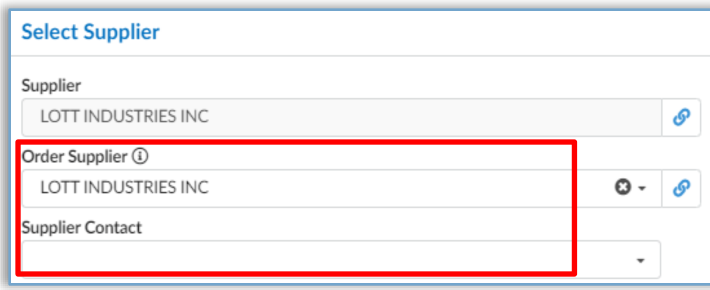
Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

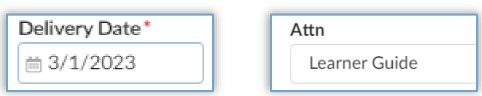
1) Click the **Pencil** (✎) icon next to one of the items to open it.



2) Select the **Order Supplier** and **Supplier Contact**.

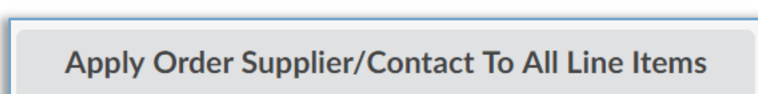


3) If desired, select/update the **Delivery Date** and populate the **Attn** field.



4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

5) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.



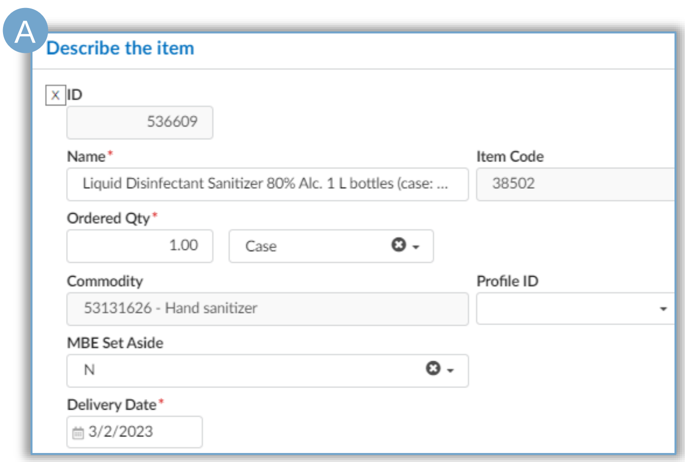
Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

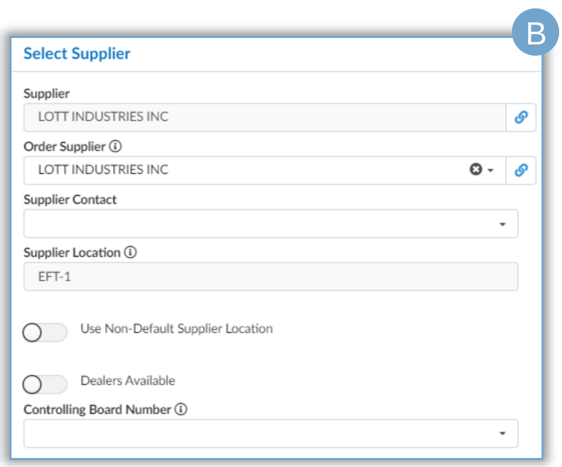
12

When reviewing the line item details for an individual line item, you can update information in the following sections:

a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.

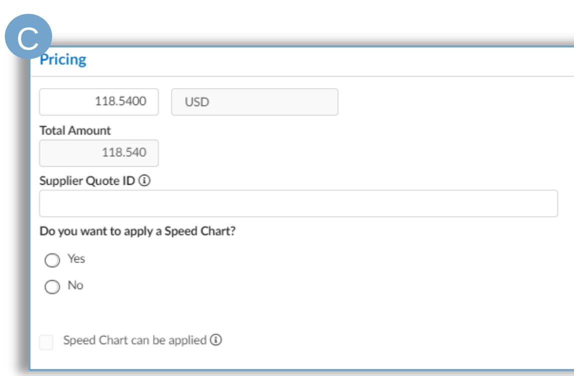
b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. Note that when making purchases referencing certain contracts, the Order Supplier field will populate automatically. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.

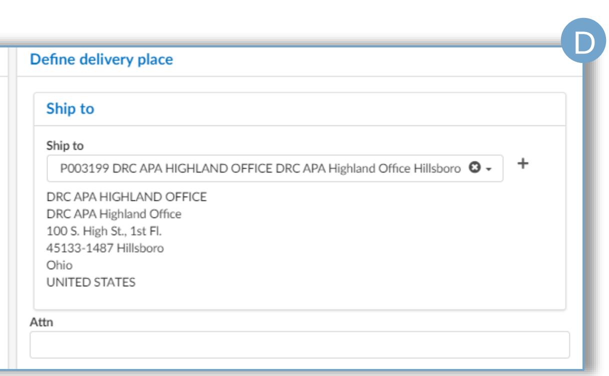




c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the *Create and Release a Quick Quote Solicitation* Job Aid for instructions on how to conduct a quick quote.

d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.



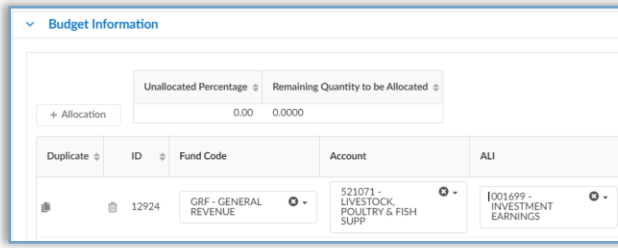


Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

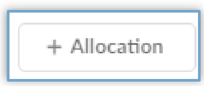
12

e) Budget Information: Expand this section to add chartfield information for the line item.

- Chartfield information is not required for Pcard purchases unless directed by your agency. Please consult with your agency admin to confirm whether or not your Pcard purchases require chartfield information.
- The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

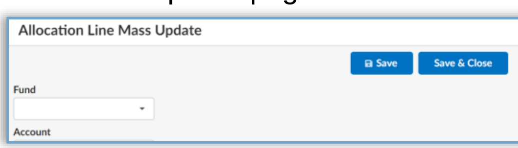


- Chartfield lines can be duplicated by clicking the **Copy** ( ) icon or deleted by clicking the **Trashcan** ( ) icon.
- When adding chartfield information, users can click **+ Allocation** to add an additional chartfield string.

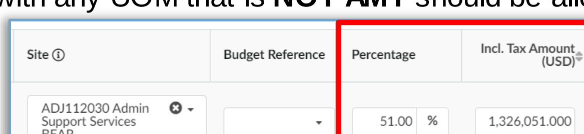


- Users can update fields in multiple chartfield strings at once by clicking the **Checkbox** ( ) Icon next to the strings they want to update and then clicking **Edit Lines**.

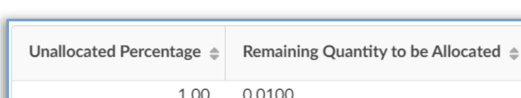
This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.



- How a user allocates their chartfields will depend on the **UOM** selected for the line item. Users should only enter allocations for items with an UOM of **AMT** in the **Incl. Tax Amount (USD)** field. Items with any UOM that is **NOT AMT** should be allocated using the **Percentage** field.

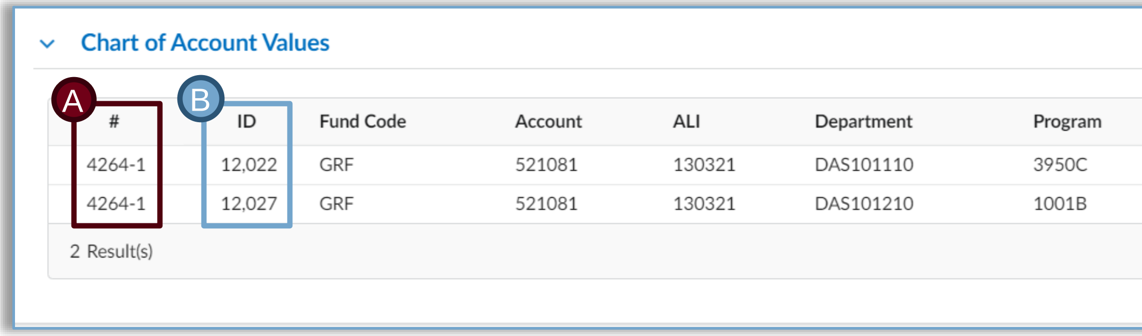


- OhioBuys allows percentage allocations with precision up to 2 decimal places, (e.g., 1.00%) and when allocating by amount, will round up or down based on percent to two decimal places. (e.g., 1.006% will round to 1.01% and adjust the amount accordingly)
- A table displaying the remaining percentage/quantity to be allocated is visible at the top of the **Budget Information** section.

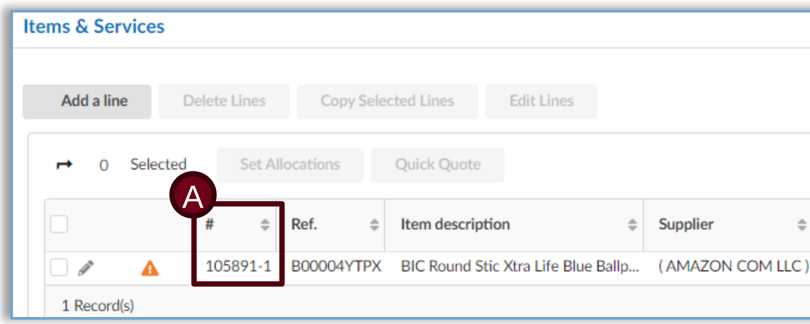


Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

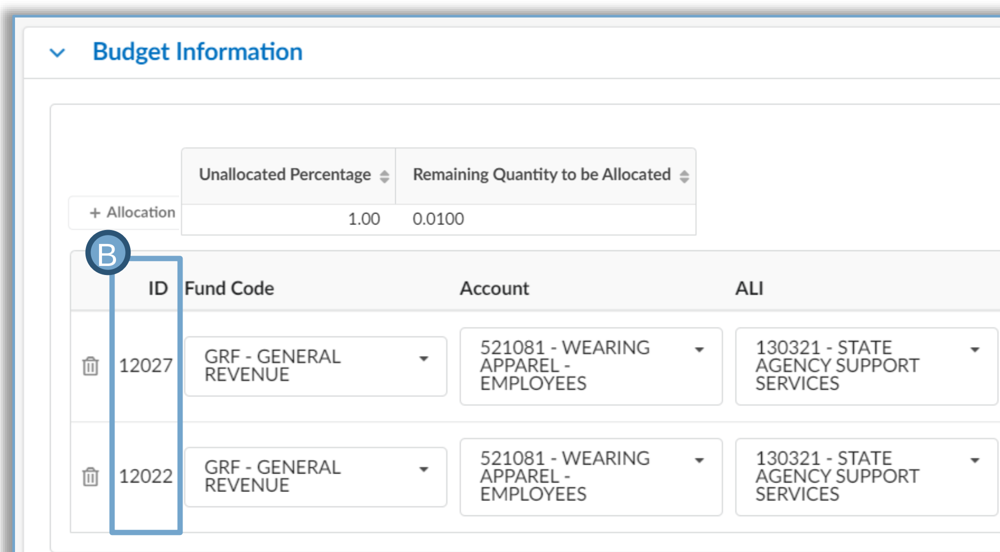
To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header. When reviewing the Chart of Account Values table, please note that:



a) The # column will correspond to the # column in the Items grid denoting different line items.



b) The **ID** column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.



Step-by-Step Instructions for Submitting a Punchout Catalog Purchase Requisition

13 Once you are done making updates to the line item's information, click the **Save & Close** button.

Save & Close

14 Continue making updates to any remaining line items using Steps 12-13. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit for Approval.**

Submit for Approval

⚠ In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the *Creating and Awarding Quick Quotes* Learner Guide for details on the Quick Quote process.

15 After your requisition has been submitted for review, you can check its approval status at any time.

⚠ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.

⚠ To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

Workflow Main Approvals

Purchase Requisition	Activity	Approval Type	Approved	Name	Order	Performed by	Validated on (UTC-5)	ID	Agency
Req. 2/23/2023	Procurement	37	☐	Chapa Jarrod	10			1629466	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37	☐	Whalen Kelli	10			1629467	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37	☐	Dripps Jeffrey	10			1629470	DPS-Dept of Public Safety

3 Record(s)

⚠ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.

⚠ You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

⚠ With the recent Search360 update, users may have the ability to search some punchout catalogs directly on the Browse Items page. This is dependent on how supplier(s) configure their catalogs.

SUBMIT A FREEFORM PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the process for creating and submitting a purchase requisition containing freeform items – items that are made by the user and not contained in any hosted or punchout catalog – formerly known as a Special Request purchase requisition in OAKS
- Roles: Requesters, Requisitioners
- Used When: Creating a purchase requisition for an item that is not available from a hosted or punchout catalog

OhioBuys
Connecting Buyers and Suppliers

OhioBuys Submit a Freeform Purchase Requisition

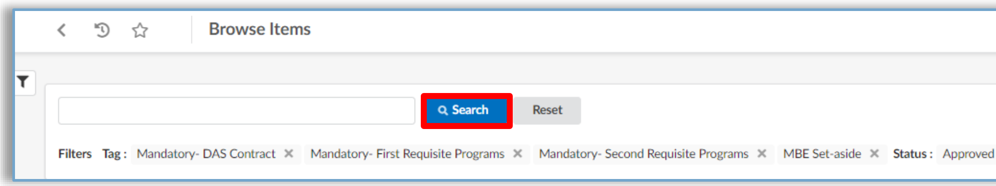
Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

1

Log in to OhioBuys. From the Main Menu Navigation bar, click **Shop** and then select **Browse Items** from the drop-down menu.

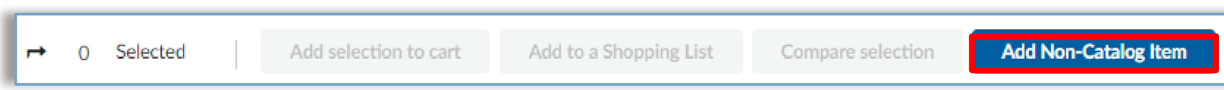
2

The Browse Items page is displayed. On this page, you can enter a variety of search terms to search for goods and services in OhioBuys. Enter search terms in the Keywords field (must be at least three characters) and then click **Search.** Search terms can include descriptors for the item such as item label description, item number, index number, manufacturer part number, etc. By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An item tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In addition, item tags also indicate if an item is linked to an MBE Set-Aside contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms. If you remove all tags and do not have any search terms then no items will come up.

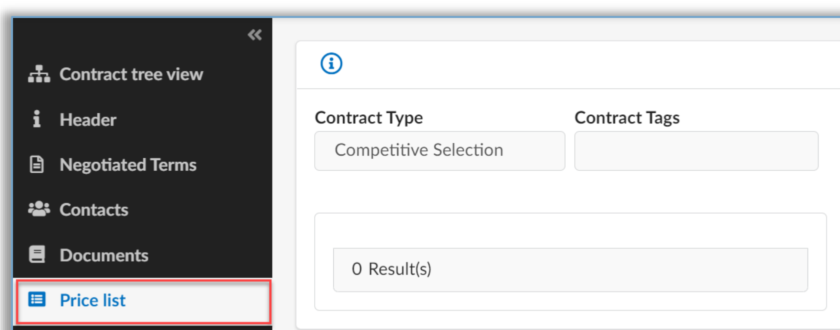


3

If you are unable to find what you are looking for in OhioBuys or if the contract you are ordering from does not have a price list, you can create a freeform line item. Click **Add Non-Catalog Item.**



⚠ Some contracts in OhioBuys do not have a price list associated with them. If this is the case, you will need to add freeform line items to a purchase requisition in order to purchase from that contract. In addition, as a reminder, you can see if a contract has a price list in OhioBuys by opening a contract from the Browse Contracts page and navigating to the Price List tab. If the Price List tab does not contain any items, then you will need to add freeform line items to a purchase requisition in order to purchase from that contract.



Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

4

Complete the following fields in the **Describe the Item** section:

a) Enter the **Name** of the good or service you would like to request. The Name should be a short description of the good or service.

b) Enter the **Ordered Quantity** and adjust the **Unit of Measure** as needed.

⚠ If you plan to encumber to OAKS and enter receipts against the PO, then you must use a Unit of Measure other than "AMT".

⚠ If the purchase order is likely to result in multiple invoices, users should not use a quantity-based unit of measure (i.e., a unit of measure other than 'AMT') and a quantity. OSS no longer allows the use of “force pricing” and will reject invoices billing a partial quantity with a quantity-based unit of measure (e.g., Each) as the unit of measure and 1 as the quantity. Instead, when multiple invoices are expected for a PO line using a unit of measure that is not 'AMT', the quantity on the PO line should match or exceed the quantity to be invoiced and include a per-unit price on each line to achieve the correct total encumbrance.

c) Enter and select the associated **Commodity.** You should select the most applicable commodity code as possible.

⚠ If you are having trouble finding the correct commodity in OhioBuys, you can also visit the UNSPSC website (https://www.unspsc.org/search-code) to search for a commodity. Note that if a commodity code you wish to select is not currently in OhioBuys, you will need to submit a help desk ticket in order for it to be added.

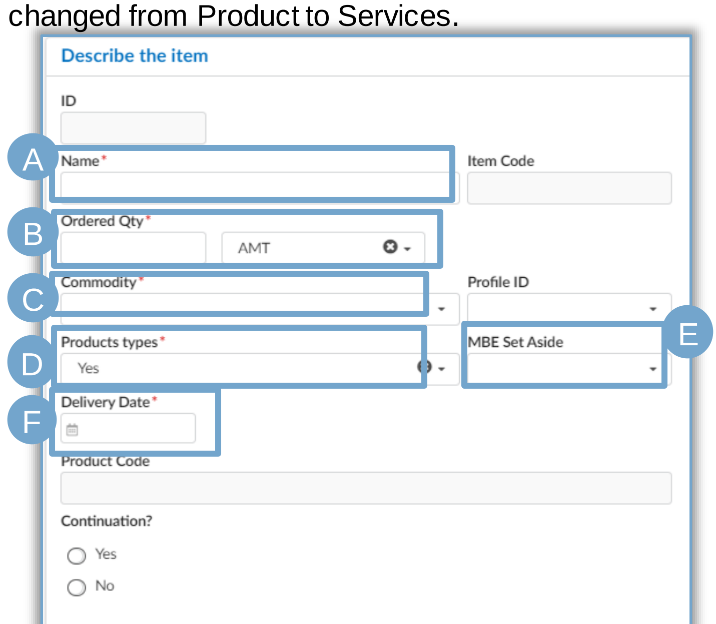
d) Select the **Product type** (e.g., Product or Services).

a) If this purchase is supposed to be an MBE Set Aside or EDGE purchase, select using the **MBE Drop-Down** menu. Agencies should also denote on the PO line comments if vouchers referencing that line item should be flagged as MBE set-aside.

- M indicates the item is an MBE item
- E indicates the item is an EDGE item
- N indicates the item is neither MBE, nor EDGE

d) Select the **Delivery Date** (or date range for Services).

⚠ In addition, please note that the Delivery Date field for a line item will disappear if the Product types is changed from Product to Services.



Submit a Freeform Purchase Requisition

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

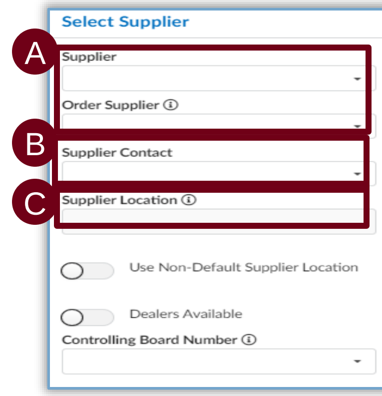
5

Complete the following fields in the **Select Supplier** section:

a) If you know the Supplier that should supply this item, enter or select their name in the **Supplier** and **Order Supplier** fields. The **Order Supplier** is typically the location of the Supplier office that will fulfill the order. Please note, only Suppliers who are registered in OhioBuys can be selected in these fields.

b) Select the applicable **Supplier Contact,** though not required.

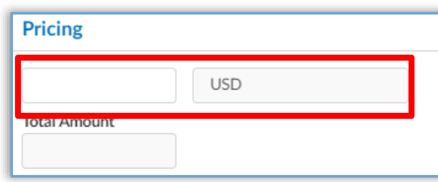
c) Select the **Supplier Location** according to the Supplier's preferences in OAKS. After saving the Order Supplier, this field will automatically populate with the Supplier's default Location in OAKS. To use an alternative Location, you must click the **Use Non-default Supplier Location** slider.



⚠ Agencies may use the ENC TYPE ENCUMBRANCES Supplier on their Purchase Requisition if the supplier is unknown at the time the encumbrance is being created (e.g. encumbering contingency funds on construction projects).

6

Enter the **Cost** for the item in the **Pricing** section.



7

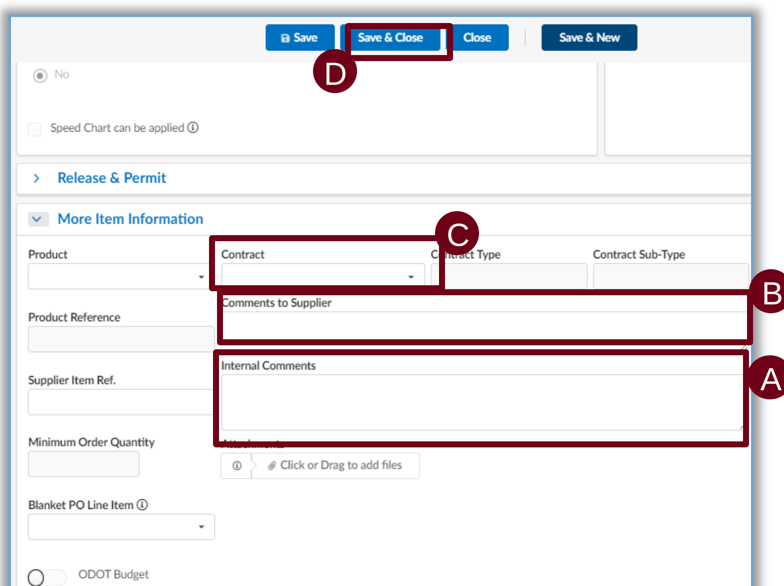
Expand the **More Item Information** section and then:

a) Enter a detailed description of why you are requesting a freeform item in the **Internal Comments** field.

b) Enter any comments for the Supplier in the **Comment** field as needed and attach any Supplier facing documents using the **Attachments** button.

c) If you are purchasing from a contract that does not have a price list, be sure to enter and select the associated contract on the **Contract** field.

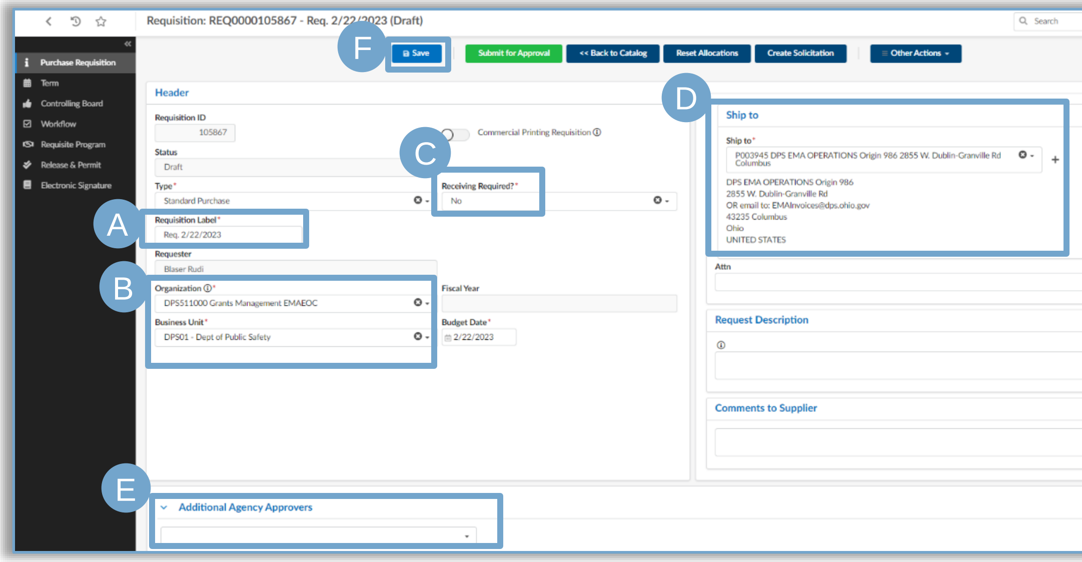
d) Click **Save & Close**.



Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

8

The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.



a) Update the **Requisition Label** using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is *"Office Supplies JD"*).

b) Select your **Organization,** which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.

c) Indicate if you would like receiving to be required in OhioBuys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in OhioBuys in order for any Supplier submitted invoices to be processed.

d) Select the requisition's **Ship To** address. If you cannot find the shipping address, click the '**+**' icon to provide a one-time delivery address.

⚠ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters), your Agency Procurement Approvers (for Requisitioners), or the requisition is processed into a purchase order (for Pcard purchases only).

f) Click **Save.**

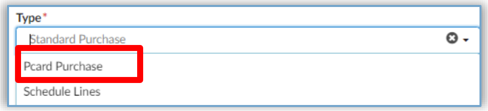
⚠ If you have the Requisitioner (On Behalf Of) role, you are able to update the **Requester** field if the purchase requisition is being created for another user. In order to do this, you must first select your **Organization** and then click **Save.** Requisitioners will only be able to select users that are within their scope.

OhioBuys Submit a Freeform Purchase Requisition

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

▲

If you would like to make this purchase a Pcard purchase, change the requisition **Type** by selecting **Pcard Purchase** from the drop-down menu, then click **Save**.



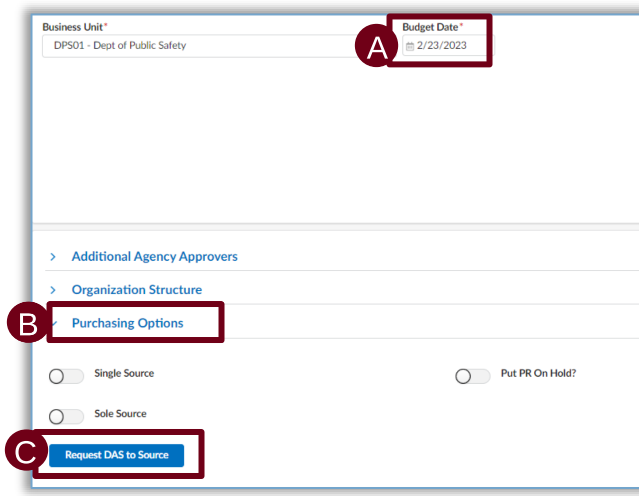
For more information on completing a Pcard purchase, please refer to [Submit a Pcard Purchase Requisition](#).

9

a) Select the **Budget Date**. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

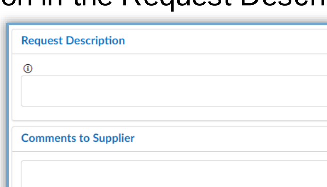
b) Expand the **Purchasing Options** section. From this section, you can indicate if a **DAS sourcing event** is required, as well as if the purchase requisition is **Single Source** or **Sole Source**. In addition, you can also note if the purchase requisition should be put on hold, and/or if it should not be encumbered.

c) Use the displayed radio buttons to make your selections. If you select that a **DAS sourcing event** is required, click the **Request DAS to Source** button to complete the associated request form.



10

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level. Information input in the Comments to Supplier field will be visible to Suppliers on the printed purchase order, however information in the Request Description field will not be.



OhioBuys

Submit a Freeform Purchase Requisition

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

11 Click the **Save** button.

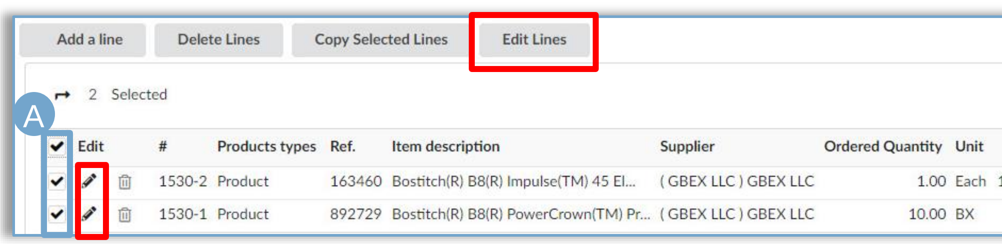
12 If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

- Internal Attachment: Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, Supplier quotes) helpful for future reference or approvals.
- Justification Document: Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a Supplier that isn't a requisite procurement program.
- Supplier Document: Documentation sent to the Supplier with the purchase order.

13 At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil ( )** icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., Supplier contact, ordered quantity, chartfield information, etc.).

If you want to edit multiple line items at one time (e.g., mass add a Supplier contact to multiple line items at once), complete the following:

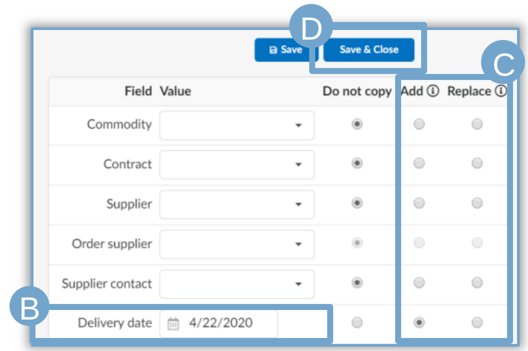
a) Click the **Individual Checkbox** icon next to the individual line items to select multiple individual line items or click the **Select All Checkbox** icon above the line items to mass edit all the line items and click the **Edit Lines** button.



b) To update the **Delivery Date**, select it from the **Delivery Date** field.

c) Click the **Add** radio button or **Replace** radio button for each of the fields you updated. Note that **Add** will add a value in a blank field only, whereas **Replace** will replace the current value with the new one selected.

d) Click the **Save & Close** button.



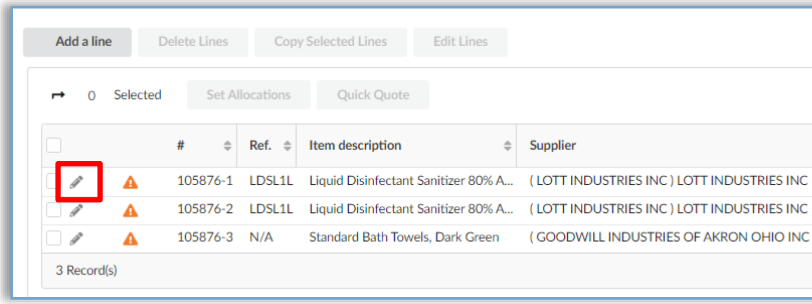
OhioBuys

Submit a Freeform Purchase Requisition

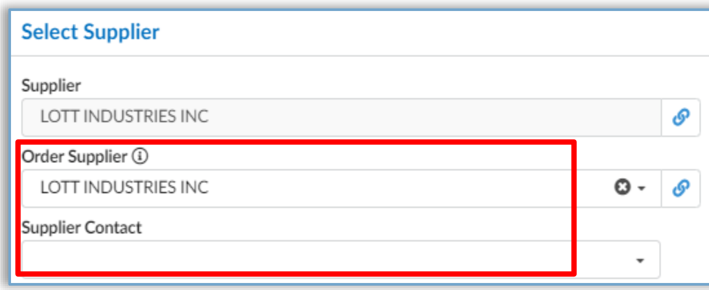
Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

To update the Order Supplier, Supplier Contact, Delivery Date, and Attn fields for multiple line items:

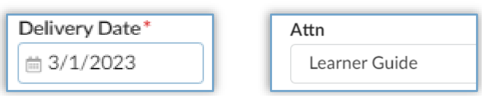
1) Click the **Pencil** (✎) icon next to one of the items to open it.



2) Select the **Order Supplier** and **Supplier Contact**.

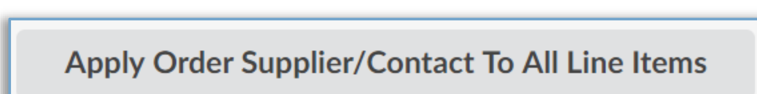


3) If desired, select/update the **Delivery Date** and populate the **Attn** field.



4) Click **Save**. You must save these changes before applying the updates to all line items in the order.

5) Click **Apply Order Supplier/Contact To All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn for all line items from that Supplier. Note that this will have no effect on other line items that are from different Suppliers.



OhioBuys

Submit a Freeform Purchase Requisition

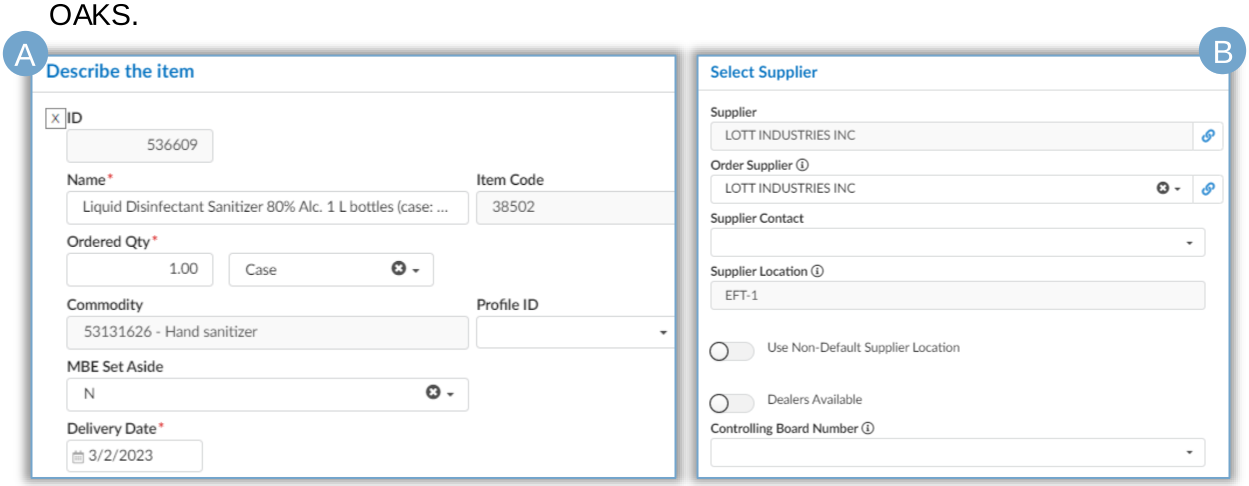
Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

14

When reviewing the line item details for an individual line item, you can update information in the following sections:

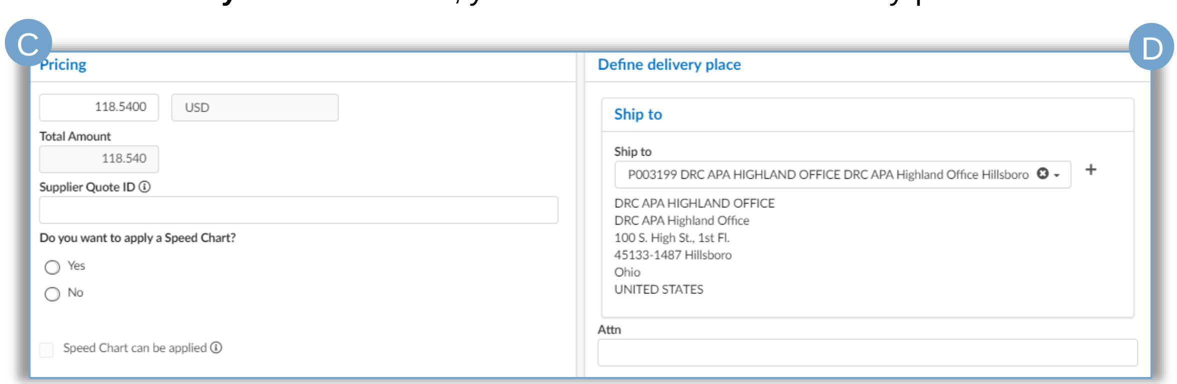
a) **Describe the Item:** You are able to update the **Ordered Quantity** and **Delivery Date** fields as needed.

b) **Select Supplier:** In some scenarios, you can select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. Note that when making purchases referencing certain contracts, the Order Supplier field will populate automatically. You should also update the Supplier Location field according to the information that Supplier has listed in OAKS.



c) **Pricing:** You are able to adjust the price for hosted and punchout catalog items, as needed. Whenever you adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document. The price can also be adjusted after conducting a quick quote within OhioBuys. Please refer to the *[Create and Release a Quick Quote Solicitation](#)* Job Aid for instructions on how to conduct a quick quote.

d) **Define Delivery Place:** If desired, you can define a different delivery place for each item.



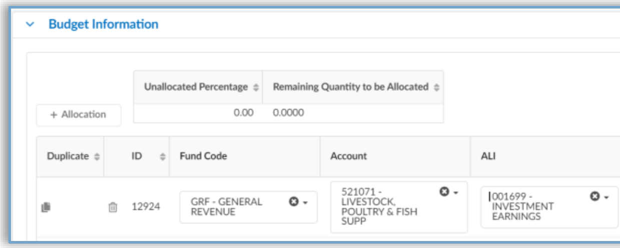
Submit a Freeform Purchase Requisition

Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

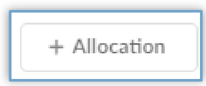
12

e) **Budget Information:** Expand this section to add chartfield information for the line item.

- Chartfield information is not required for Pcard purchases unless directed by your agency. Please consult with your agency admin to confirm whether or not your Pcard purchases require chartfield information.
- The information entered in this section is the same information that was previously provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information. Chartfield information locks after the Fiscal Approver completes their review.

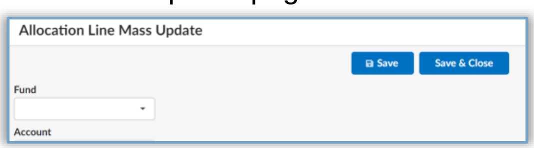


- Chartfield lines can be duplicated by clicking the **Copy** ( ) icon or deleted by clicking the **Trashcan** ( ) icon.
- When adding chartfield information, users can click **+ Allocation** to add an additional chartfield string.

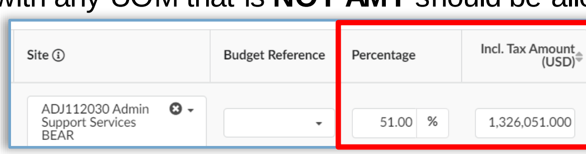


- Users can update fields in multiple chartfield strings at once by clicking the **Checkbox** ( ) Icon next to the strings they want to update and then clicking **Edit Lines**.

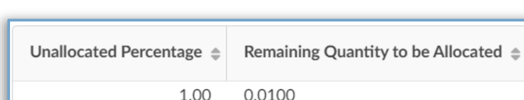
  This opens the Allocation Mass Update page where users can apply chartfields to all selected lines.



- How a user allocates their chartfields will depend on the **UOM** selected for the line item. Users should only enter allocations for items with an UOM of **AMT** in the **Incl. Tax Amount (USD)** field. Items with any UOM that is **NOT AMT** should be allocated using the **Percentage** field.

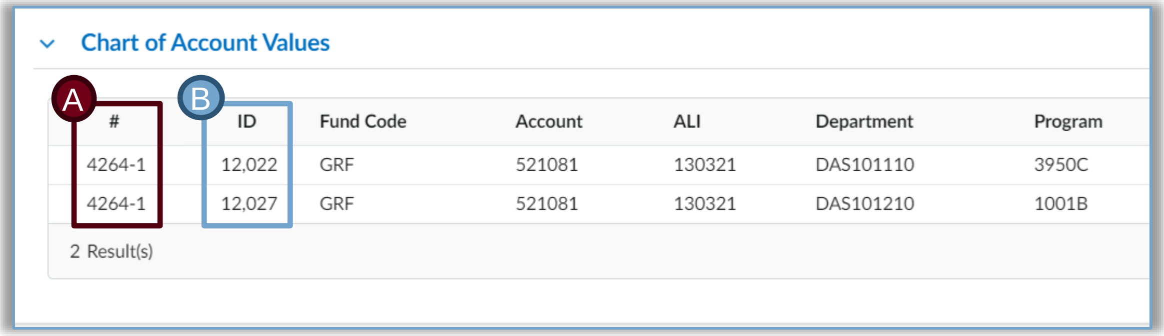


- OhioBuys allows percentage allocations with precision up to 2 decimal places, (e.g., 1.00%) and when allocating by amount, will round up or down based on percent to two decimal places. (e.g., 1.006% will round to 1.01% and adjust the amount accordingly)
- A table displaying the remaining percentage/quantity to be allocated is visible at the top of the **Budget Information** section.

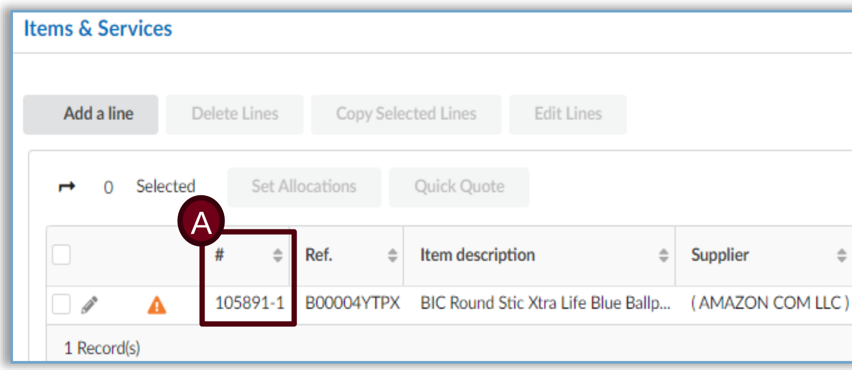


Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

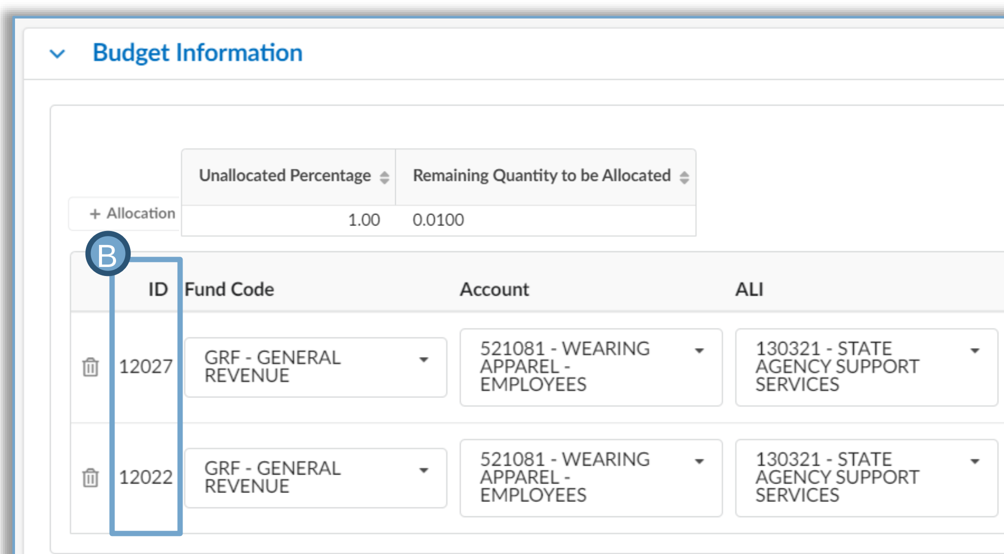
To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header. When reviewing the Chart of Account Values table, please note that:



a) The # column will correspond to the # column in the Items grid denoting different line items.



b) The **ID** column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.



Step-by-Step Instructions for Submitting a Freeform Purchase Requisition

15 Once you have finished making updates to the line item's information, click the **Save & Close** button.

Save & Close

16 Continue making updates to any remaining line items using Step 15-16. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit for Approval.**

Submit for Approval

- In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and your agency's procurement policies. Please refer to the *Creating and Awarding Quick Quotes* Learner Guide for details on the Quick Quote process.

17 After your requisition has been submitted for review, you can check its approval status at any time.

- If you would like to print the details of your requisition, click the **Print ( )** icon in the top right of the page.
- To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

Workflow Main Approvals

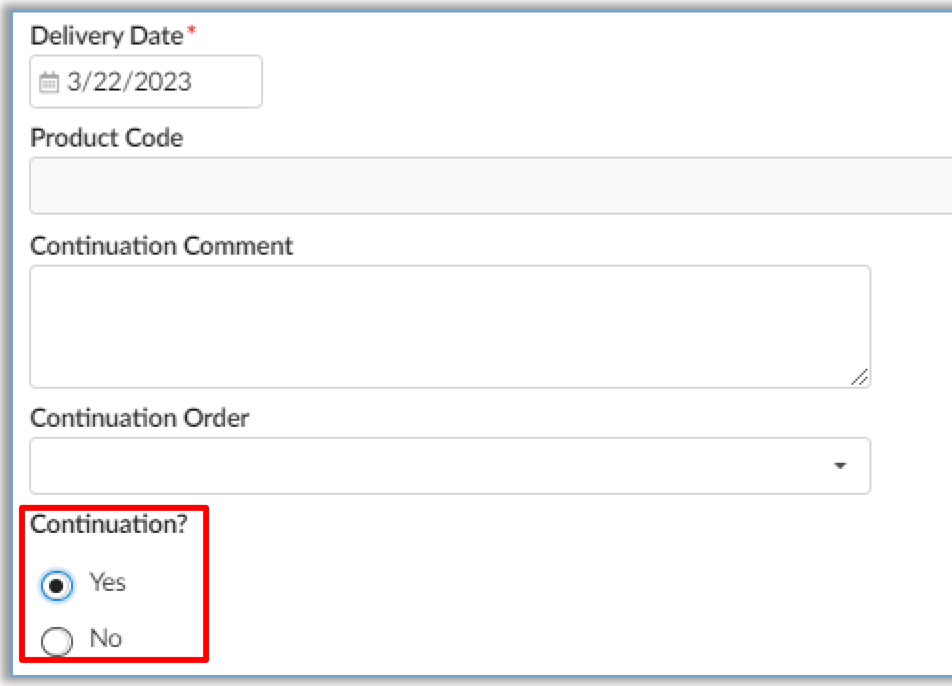
Purchase Requisition	Activity	Approval Type	Approved	Name	Order	Performed by	Validated on (UTC-5)	ID	Agency
Req. 2/23/2023	Procurement	37		Chapa Jarrod	10			1629466	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37		Whalen Kelli	10			1629467	DPS-Dept of Public Safety
Req. 2/23/2023	Procurement	37		Dripps Jeffrey	10			1629470	DPS-Dept of Public Safety

3 Record(s)

- On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

Note on Continuation Purchases

Guidance for Flagging Continuation Purchases



If a purchase is a continuation of a previous purchase off of an STS contract, users must indicate this on the line item(s). Click **Yes** in the **Continuation?** field on each line item that is part of a continuation purchase. This will allow you to enter any relevant comments in the Continuation Comments field.

If the previous purchase was made in OhioBuys, search for the PO number in the **Continuation Order** field and select it from the drop-down menu. Then click **Save**.

- Users should also attach any supporting documentation referencing the original solicitation and/or purchase in the **Attachments** section on the purchase requisition header.

- A continuation on a purchase originating from an STS contract where the initial solicitation and purchase were made outside of OhioBuys will not show up in the Continuation Order field. This will cause the new PR to show up on the STS exception report.

Note on Negative Line Items

Guidance for Handling Negative Line Items

In OhioBuys, purchase requisition line items cannot have a negative dollar value. If a line item has a negative value, the purchase requisition will not be able to be processed into a purchase order.

Users should keep the following points of guidance top of mind when faced with negative line items:

- Under no circumstances should a user create freeform line items with a negative dollar value.

- If a user receives a quote for a negative line item from a Supplier, the user should adjust the price of a positive line item accordingly by the given negative dollar amount and include a note about the discount in the “Comments to Supplier” field. The user should not import or use the negative line item by itself in that purchase requisition.

- If a user encounters a negative line item when browsing a hosted catalog, they should submit a helpdesk ticket and include the contract number tied to that negative line item. The associated Contract Analyst for that contract will then work with the Supplier to correct and update the catalog item.

Note on Release & Permit Purchases

Guidance for Creating Release & Permit Purchases

A Request to Purchase (RTP) should be created to place IT and non-IT sourcing and contracting requests with the DAS Office of Procurement Services (OPS).

Purchases from a State contract established by the Office of Procurement Services (OPS) do not require an RTP.* If an agency is attempting to purchase items off an existing OPS State contract or making a purchase from a Requisite Procurement Program (e.g., OPI), they can proceed directly to creating a PR.

*Except for services being requested under the Third-Party Administrator (TPA) for Facility Maintenance and Repair Projects contract (Index # GDC160 Contract #CSP905120-1) and competitive selection two phase prequal contracts, in which case an RTP is required.

Non-IT Purchases

If an agency is making a purchase that does not reference an existing OPS State contract, consider the total dollar amount of the purchase need. For purchases that do not reference an OPS State contract, users should proceed directly to creating a PR if the total value of the purchase need less than $50,000.

If the purchase does not reference an OPS State contract and the total value of the purchase need is above these dollar thresholds, agencies are required to submit a RTP to start the purchasing process. In addition, if the total value of the purchase would result in your agency's Direct Purchase Authority (DPA) being exceeded with a particular supplier, an RTP is required.

There are a few exceptions to these guidelines. An RTP is not required if the purchase is covered by an existing non-IT Blanket Release & Permit (R&P), or if the purchase is exempt from DAS authority under the Ohio Revised Code.

IT Purchases

If an agency is making an IT purchase that does not reference an existing OPS State contract and need an IT R&P, the following needs to be considered:

1. Sole or Single Source – create either a PR referencing an IT account code or Agency-administered contract using the IT checkbox to identify the contract as IT.

a. Attach supporting documentation and include the draft Controlling Board request if using Controlling Board purchase authority, or documentation to demonstrate compliance with PM-01.

Note on Release & Permit Purchases

Guidance for Creating Release & Permit Purchases

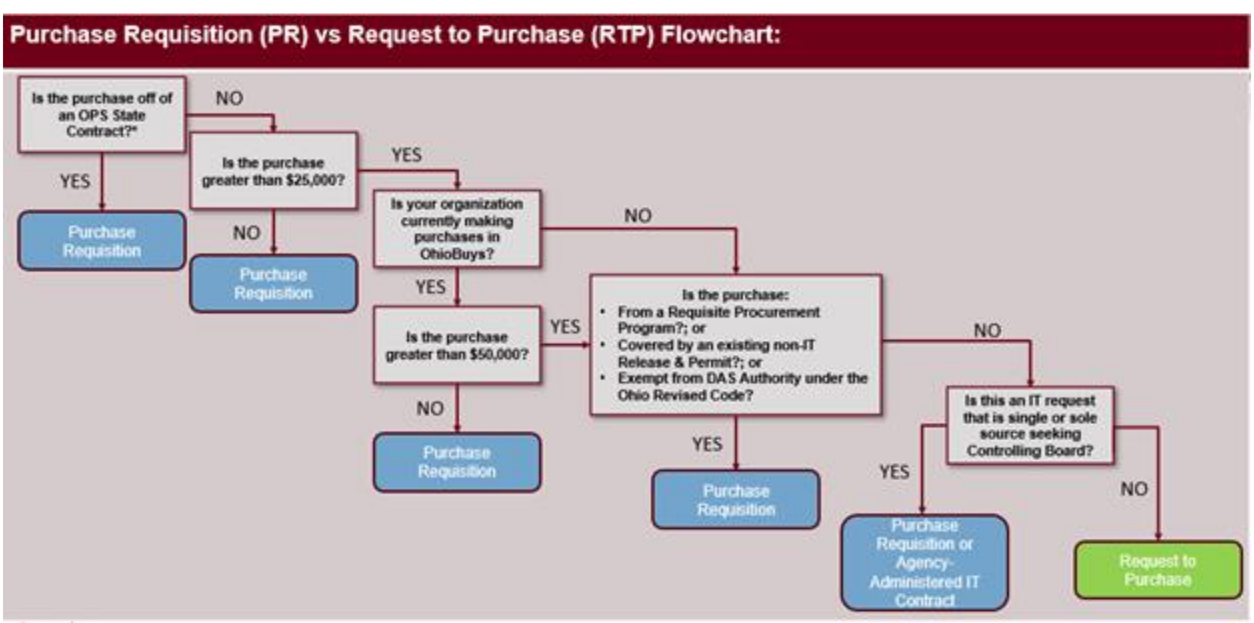
i. Create Agency-administered contract - agencies can create an agency-administered contract in OhioBuys, flag it as an IT contract using the IT checkbox and populate the Contract Not to Exceed field on the Negotiated Terms tab of the contract.

If the agency is requesting biennium Controlling Board approval as part of this contract, select the Biennium Fiscal Year 1 and Biennium Fiscal Year 2 and then enter the Biennium Fiscal Year Amount for each fiscal year.

Once the contract is submitted, it will automatically route for the necessary IT approvals (e.g., IT SIM, IT SME, EITC Analysts, etc.). After IT has completed their review, an IT R&P number will be generated and will be linked on the Release & Permit field on the header of the contract. The Contract Responsible user will receive an email notification once the necessary approvals have been received.

2. If an agency has a procurement need that is not on an OPS contract or is not provided via a sole or single source provider over $50,000.00, an RTP must be submitted to determine the appropriate procurement method. For example, a Request for proposal, Invitation to Bid, new DAS contract, or IT agency-released solicitation.

Please reference the below flowchart to help determine whether a RTP is necessary is for a purchase:



Note on Release & Permit Purchases

Guidance for Creating Release & Permit Purchases

In the event that users start with a PR in OhioBuys, it will route through the appropriate requisition workflow and be assigned an R&P as a part of the PR workflow. In these cases, the PR will subsequently end up routing to the “DAS Released Requisition” step of the workflow. The requisitioner can add the Controlling Board Number while the PR is at this step, before submitting it to the Final Approver step.

If the agency creates an RTP or an IT agency-administered contract to obtain the release and permit, the agency can then create PRs at any time and reference their IT agency-administered contract or assigned R&P number and Controlling Board number (once the Controlling Board number is available in OhioBuys). If an agency has an IT agency administered contract with an IT R&P, they can reference the contract on their line item and the system will automatically grab the R&P and bypass EITC reviews. In cases where the Controlling Board number is entered before reaching the “DAS Released Requisition” step, the workflow will bypass this step and the requisition will route to the Final Approver step.

APPROVING PURCHASE REQUISITIONS

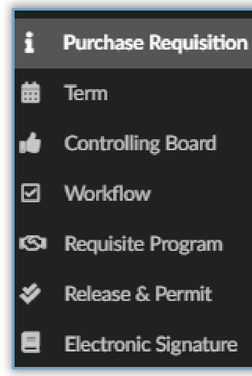
Topics

- Review and Update a Purchase Requisition (Requisitioners)
- Approve a Purchase Requisition (Requester Supervisor)
- Approve a Purchase Requisition (Agency Procurement Approver)
- Approve a Purchase Requisition (Agency Fiscal Approver)
- Approve a Purchase Requisition (Agency Final Approver
- Review Sourcing Details for a Purchase Requisition

Multiple Agency Approvers

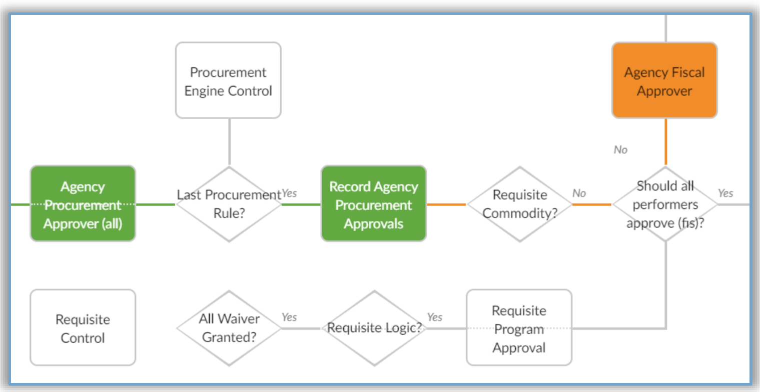
Some agencies have chosen to implement multiple agency approvers at certain steps of the PR approval workflow. For example, an agency can choose to assign multiple users to an Agency Fiscal Approver rule (e.g., order 10), and with these multiple approvals enabled, all users will need to approve a PR before it advances to the next level (i.e., order 20) of that Agency Fiscal Approval rule.

When does a step require multiple approvals?



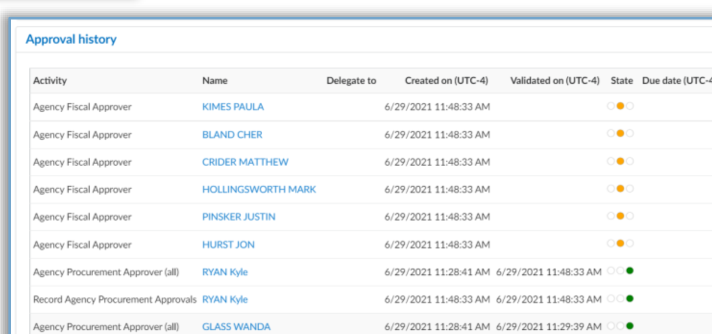
The simplest way to determine whether or not multiple approvers will be required at a step is to navigate to the **Workflow** tab of the PR and locate the current position in the workflow. As a reminder, the current step of the workflow is highlighted in **Orange** while completed workflow steps are highlighted in **Green**.

Steps where multiple approvers will be required will have the suffix "(all)" at the end of the step name. In the example below, we can see that the Agency Procurement Approver step includes the suffix, while the Agency Fiscal Approver step does not.



In this case, multiple users were required to approve the PR at the Agency Procurement Approver step, however only one of the possible Agency Fiscal Approvers will need to approve the PR to advance in the workflow.

Users can also confirm whether multiple approvals will be required by navigating to the Approval History table at the bottom of the Workflow tab. Like the workflow, steps with the suffix "(all)" will require every assigned approver to approve, whereas steps without the suffix require just one approval. For more information on your agency's approval workflow, please consult with your Agency Admin.



Approval history

Activity	Name	Delegate to	Created on (UTC-4)	Validated on (UTC-4)	State	Due date (UTC-4)
Agency Fiscal Approver	KIMES PAULA		6/29/2021 11:48:33 AM			
Agency Fiscal Approver	BLAND CHER		6/29/2021 11:48:33 AM			
Agency Fiscal Approver	CRIDER MATTHEW		6/29/2021 11:48:33 AM			
Agency Fiscal Approver	HOLLINGSWORTH MARK		6/29/2021 11:48:33 AM			
Agency Fiscal Approver	PINSKER JUSTIN		6/29/2021 11:48:33 AM			
Agency Fiscal Approver	HURST JON		6/29/2021 11:48:33 AM			
Agency Procurement Approver (all)	RYAN Kyle		6/29/2021 11:28:41 AM	6/29/2021 11:48:33 AM		
Record Agency Procurement Approvals	RYAN Kyle		6/29/2021 11:48:33 AM	6/29/2021 11:48:33 AM		
Agency Procurement Approver (all)	GLASS WANDA		6/29/2021 11:28:41 AM	6/29/2021 11:29:39 AM		

REVIEW AND UPDATE A PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the process of reviewing and updating a purchase requisition that has been submitted by a Requester
- Roles: Requisitioners
- Used When: Updating a purchase requisition that has been submitted by a Requester

OhioBuys

Review and Update a Purchase Requisition

Step-by-Step Instructions for Reviewing and Updating a Purchase Requisition

1

⚠ You will receive an email notification when you have a purchase requisition to review, and it will also be visible on the OhioBuys homepage as an open workflow task in your My Pending Validations box.

Log in to OhioBuys. From the Main Menu Navigation Bar, click **Procurement** and then click **Browse Requisitions** from the drop-down menu.

⚠ The My Pending Validations window on the OhioBuys homepage shows the most recent tasks awaiting your review. If desired, you can click on the Object hyperlink for any task to quickly view and take action on it. Once you have found the task you would like to open, click the **Pencil** ( ) icon next to it.

2

On the Browse Requisitions page, click on the **Pencil** ( ) icon next to the purchase requisition you need to review and update.

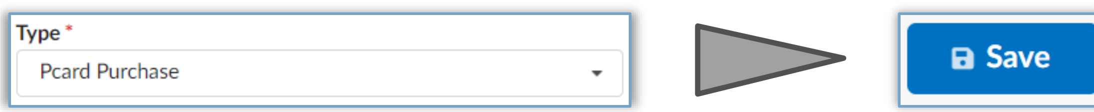
3

Review the applicable parts of the purchase requisition and ensure the fields are properly filled out.

⚠ If a user updates the **Organization** field on the header of a purchase requisition, they must click **Save** and then click **Cancel** on the subsequent popup window that is displayed.

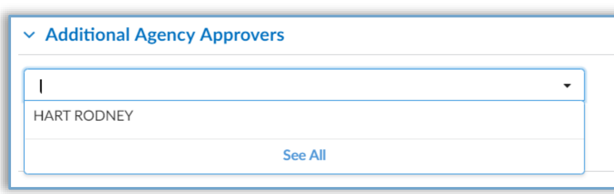
4

If the purchase requisition should be a Pcard purchase, you can apply your Pcard by updating the **Type** to Pcard Purchase and clicking **Save**.



5

If required, select any Additional Agency Approvers who will need to review the purchase requisition.



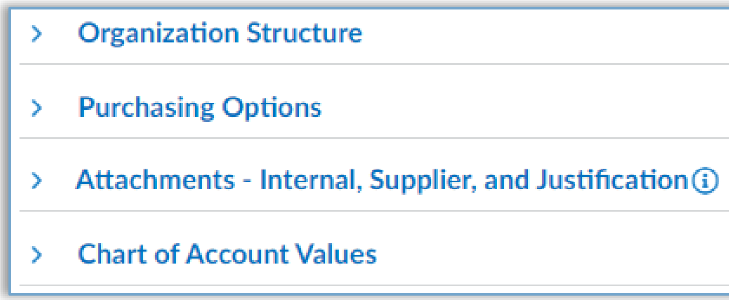
⚠ Note that only one of the selected Approvers needs to approve the purchase requisition for it to advance to a purchase order.

⚠ If you are unsure who these approvers should be, please consult with your Agency Admin.

Step-by-Step Instructions for Reviewing and Updating a Purchase Requisition

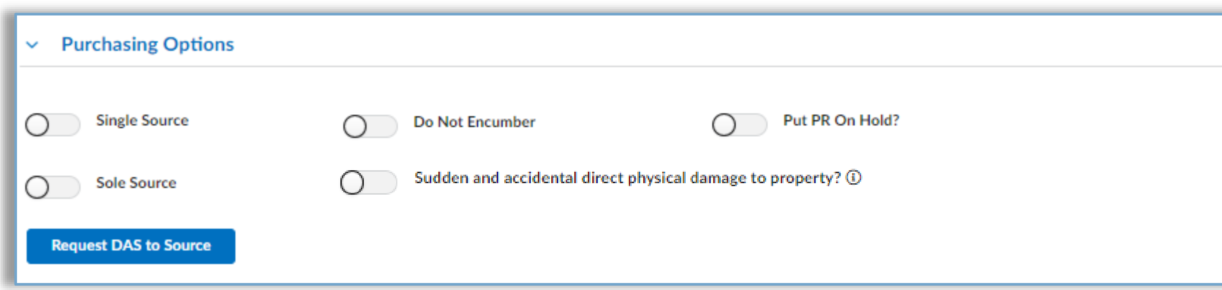
6

Scroll down to review the purchase requisition's **Purchasing Options** and **Attachments**. You can expand any of these sections by clicking on the associated header:



- Organization Structure section: View organization-related information regarding the purchase requisition

- Purchasing Options section: Indicate if the purchase requisition requires a DAS Sourcing Event, if it is Single or Sole Source, if it should be put on hold, if it should not be encumbered, or if it is related to sudden and accidental direct physical damage to property. Use the displayed radio buttons to make your selections. If a DAS Sourcing Event is required, click the **Request DAS to Source** button to complete the associated request form, which will then be routed to DAS.



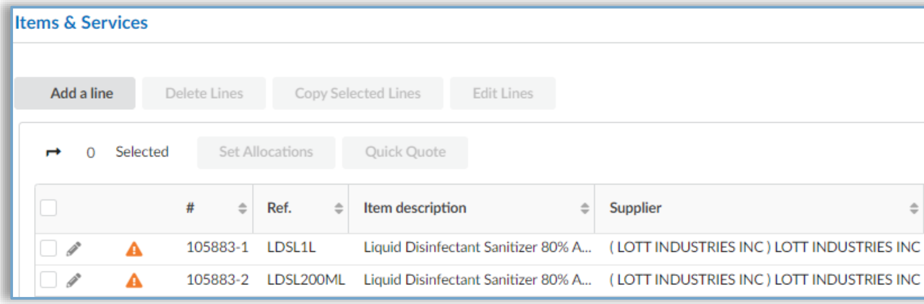
- Attachments section: Add internal, Supplier, or justification attachments as necessary

- Chart of Account Values: Expands to display all COA strings used on the purchase requisition

Step-by-Step Instructions for Reviewing and Updating a Purchase Requisition

7

a) Scroll down to the Items box to view the line item(s) associated with the purchase requisition.

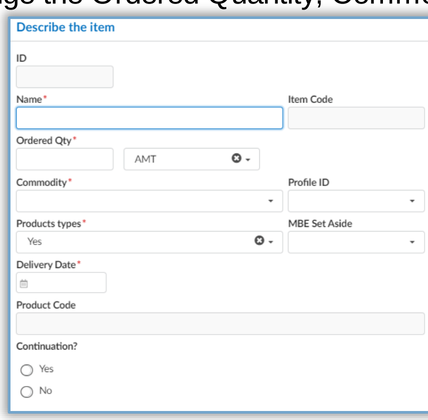


b) If a line item is not a freeform line item, ensure the information associated with the line item is accurate.

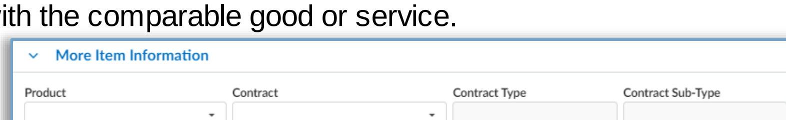
- If the purchase requisition is not a Pcard purchase, determine if budget/chartfield information must be added. If this information is already present, ensure it is accurate.

c) If the line item(s) is a freeform line item, determine if it is truly necessary or if there are comparable goods or services available in OhioBuys. If the freeform line item is truly necessary, ensure sufficient detail has been entered (e.g., has the Requester selected the correct commodity code). To check if a freeform line item has a comparable good or service in OhioBuys, click on the **Pencil** ( ) icon next to the associated freeform line item and complete the following steps:

1) In the Describe the Item box, change the Ordered Quantity, Commodity, and Product Types fields as necessary.



2) Below the Describe the Item box, click on the **More Item Information** header to search for a comparable good or service in OhioBuys and replace the current line item with the comparable good or service.



⚠ In order to update a freeform item to a catalog item, the **Order Supplier** field needs to be empty. If the field is already populated, then the populated information needs to be deleted and then the page needs to be saved. Once you click **Save**, then you will be able to search for a comparable good or service in the **Product** field.

Step-by-Step Instructions for Reviewing and Updating a Purchase Requisition

7

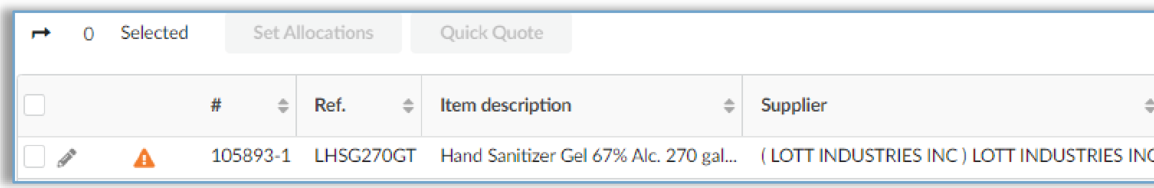
3) In the Product field, click the **Selector** (▾) icon and then click **See All** at the bottom of the drop-down menu to search for and select a comparable good or service (if applicable).

4) In the Browse Items pop-up box, enter your search terms to search for a comparable good or service and click **Search** (if applicable).

5) From the list of search results, scroll through the available results until you find your comparable good or service. Once you find the good or service you plan to replace the current freeform line item with, click the **Checkbox** icon next to it (if applicable).

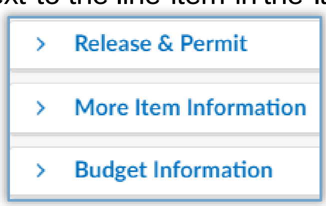
   ⚠ Once you click the Checkbox, the Describe the Item box updates based on the product information of the new line item.

6) Once you have validated the item you want, click **Save & Close** to finalize the selection. In the Items box, the line item information updates to the line item information you have chosen.



8

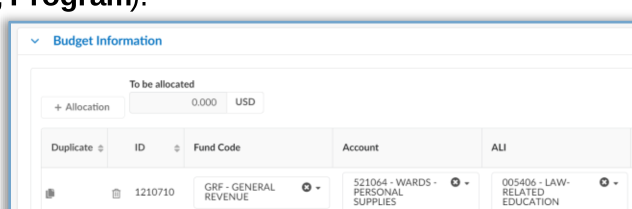
a) Whether the line items on a purchase requisition are freeform or from an OhioBuys catalog, click on the **Pencil** (✎) icon next to the line item in the Items box to view its detailed line item information.



b) Below the Describe the Item section for the line item, click on the **Release & Permit** header to view a line item's release and permit information (if applicable).

c) Click on the **Budget Information** header to view the line item's budget/chartfield information and change as necessary.

   ⚠ Within the Budget Information box, ensure existing budget/chartfield information is accurate, or complete unpopulated fields as necessary (e.g., **Fund**, **Account**, **ALI**, **Department**, **Program**).

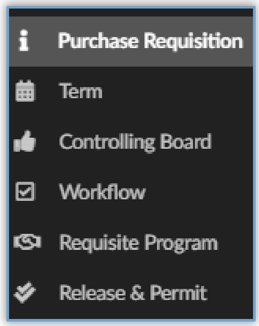


d) Once you have validated or updated the item's information as necessary, click **Save & Close**.

Step-by-Step Instructions for Reviewing and Updating a Purchase Requisition

9

Now that you have updated or changed the purchase requisition information, navigate to the tabs on the left to validate or change the purchase requisition information as necessary:



- Term tab: View associated terms (i.e., a milestone type or subscription type of term where purchase orders are released to the Supplier according to a set schedule) or create new terms by clicking Create Term
- Controlling Board tab: View the purchase requisition's Controlling Board or Direct Purchase Authority information. OhioBuys allows you to automatically check a purchase requisition's impact on your agency's Controlling Board Threshold and whether it is within your agency's direct purchase authority
- Workflow tab: View the current status and the approval history of the purchase requisition
- Requisite Program tab: View if the purchase requisition is undergoing review by a Requisite Procurement Program
- Release & Permit tab: View release and permit information associated with the purchase requisition

10

Once you have reviewed and updated the purchase requisition as necessary, click **Submit for Approval**.

- ⚠ Once you click Submit for Approval, the purchase requisition is validated.
- ⚠ If the purchase requisition does not require additional approvals, it creates a purchase order.
- ⚠ If the purchase requisition requires additional approvals, it continues along the approval process.
- ⚠ If you click Reject, input a reason in the subsequent pop-up box, the requisition is then sent back to the Requester.

APPROVE A PURCHASE REQUISITION (REQUESTER SUPERVISOR)

Overview

- What's Covered: This section discusses the process by which a Requester's Supervisor reviews and approves a purchase requisition submitted by their staff
- Roles: Requester Supervisors
- Use When: A user receives a notification that their approval is required for one of their direct reports' purchase requisitions

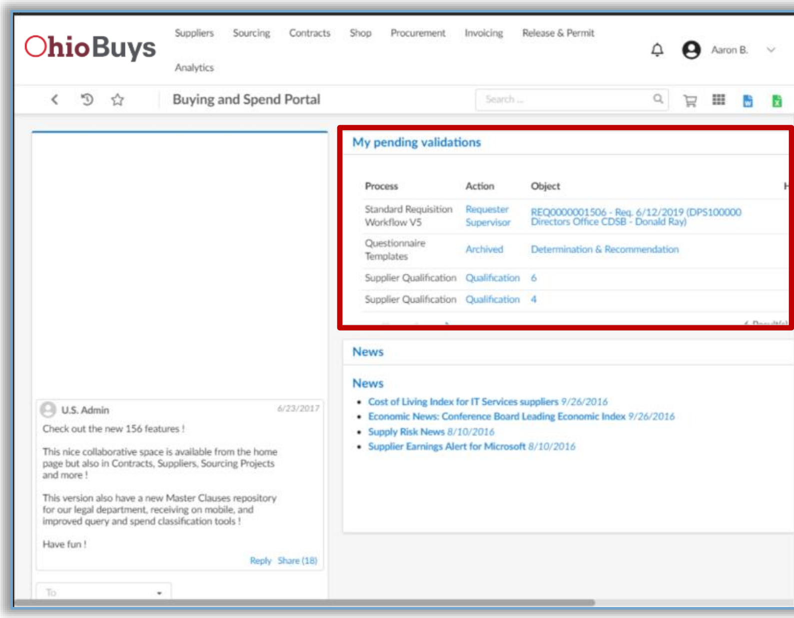
OhioBuys Approve a Purchase Requisition (Requester Supervisor)

Step-by-Step Instructions for Approving a Purchase Requisition

In the event that a Requester with no designated Requester Supervisor submits a requisition, an email notification will be sent to that Requester's Agency Admin. That Agency Admin can then follow the procedure outlined below to advance the Requester's requisition.

1

Log in to OhioBuys. The My Pending Validations window on the OhioBuys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of Requester Supervisor to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click on the **Object** name.

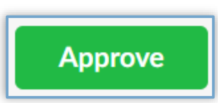


2

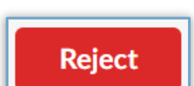
Review the information contained in the purchase requisition.

▲ Note that Requester Supervisors have editing capabilities during requisition review to make changes themselves as needed.

If the purchase requisition is justified, click the **Approve** button to approve it and send it to a requisitioner for completion.



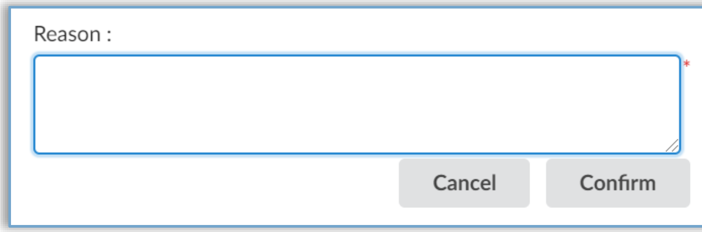
If the Requester's purchase requisition is not justified, click **Reject**. This sends the request back to the initial requester for revisions, as needed.



Step-by-Step Instructions for Approving a Purchase Requisition

2

⚠ If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the purchase requisition back to the Requester.



APPROVE A PURCHASE REQUISITION (ADDITIONAL AGENCY APPROVER)

Overview

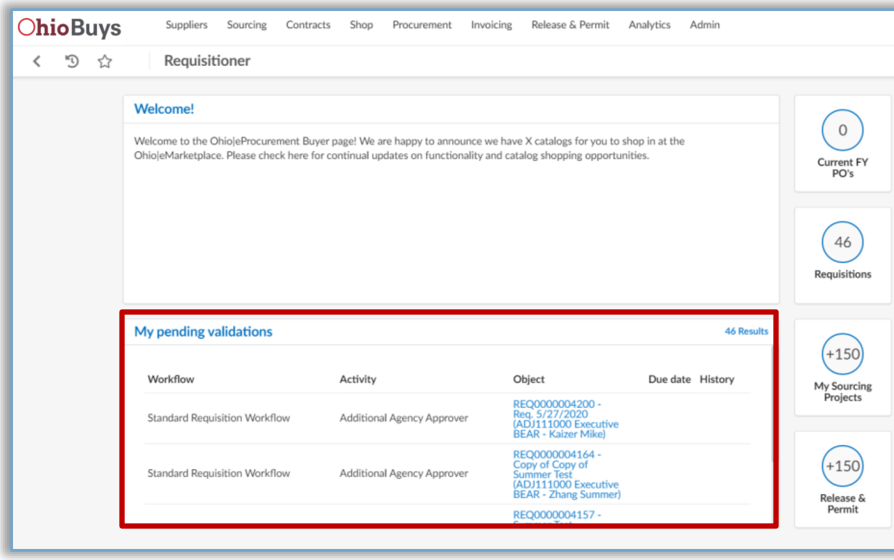
- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Additional Agency Approver
- Roles: Additional Agency Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

Approve a Purchase Requisition (Additional Agency Approver)

Step-by-Step Instructions for Approving a Purchase Requisition

1

Log in to OhioBuys. The My Pending Validations window on the OhioBuys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of Additional Agency Approver to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click on the **Object** name.



2

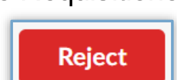
Review the information contained in the purchase requisition.

⚠ Note that Additional Agency Approvers have editing capabilities during requisition review to make changes themselves as needed.

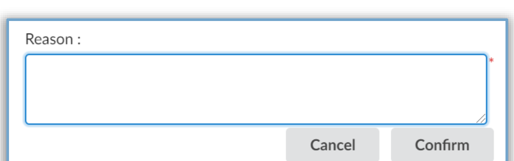
If the requisition is justified and the details are satisfactory, click the **Approve** button to approve it.

⚠ If you are approving a Pcard purchase it will automatically be processed into a purchase order once you, or any other assigned Additional Agency Approver approves.

If the purchase requisition is not justified, or any aspect of the purchase requisition requires further revisions, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.



⚠ If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. These comments will be emailed to the Requester.



APPROVE A PURCHASE REQUISITION (AGENCY PROCUREMENT APPROVER)

Overview

- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Agency Procurement Approver
- Roles: Agency Procurement Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

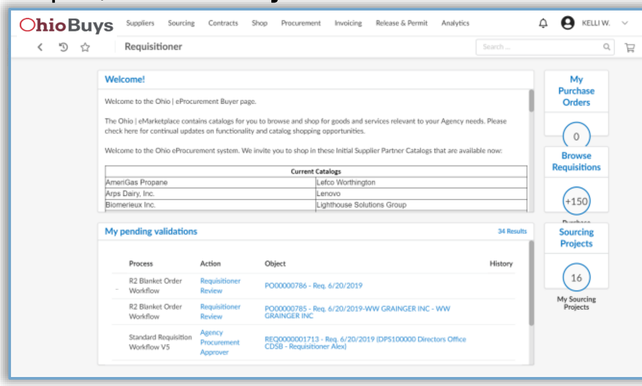
OhioBuys

Approve a Purchase Requisition (Agency Procurement Approver)

Step-by-Step Instructions for Approving a Purchase Requisition

1

Log into OhioBuys. The My Pending Validations window on the OhioBuys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of Agency Procurement Approver to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click the **Object** name.



2

Review the information contained in the purchase requisition. As the Procurement Agency Approver, you can make updates to <u>any</u> field within a purchase requisition apart from Pcard information (if applicable).

⚠ If a user updates the **Organization** field on the header of a purchase requisition, they must click **Save** and then click **Cancel** on the subsequent popup window that is displayed.

⚠ If the purchase requisition should be a Pcard purchase, you must reject it back to the Requisitioner with instructions to apply their Pcard. If the initial Requester's Pcard should be applied, instruct the Requisitioner to also reject the purchase with those instructions contained in their comment to the Requester.

⚠ Note that as the Agency Procurement Approver you are responsible for selecting any **Purchasing Options** that should be applied to the purchase requisition:

a) <u>Single Source</u>: Indicates that the purchase is from one selected Supplier, even though there are other Suppliers that provide similar products.

b) <u>Sole Source</u>: Indicates that the selected Supplier is the only one that can adequately fulfill the need outlined in the purchase requisition.

c) <u>Put PR On Hold</u>?: If DAS Procurement review chooses not to release the procurement, they have the ability to put it on hold and do the procurement on behalf of the agency

d) <u>Do Not Encumber</u>: Selecting this button will not encumber funds in OAKS for the purchase requisition. Please note that if the Pcard slider is selected for a purchase requisition, this option will not be displayed and OAKS will automatically not encumber the purchase.

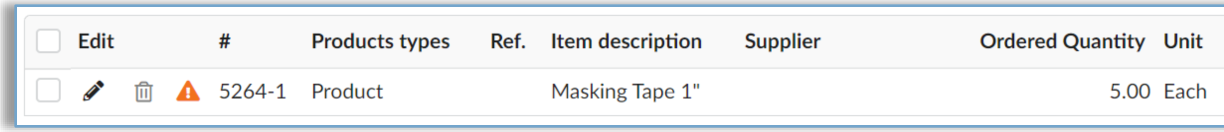
e) <u>Sudden and accidental direct physical damage to property?</u>: Indicates if the purchase is related to property damage. This requisition will appear in a report sent to DAS Office of Risk Management

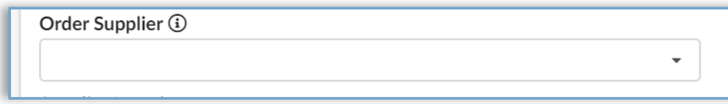
Approve a Purchase Requisition (Agency Procurement Approver)

Step-by-Step Instructions for Approving a Purchase Requisition

2

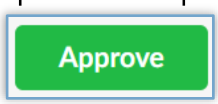
⚠ Note that as the Agency Procurement Approver you may need to update the **Order Supplier** if one has not already been selected. This can be accessed by clicking the **Pencil** (✎) icon next to a line item, and selecting an **Order Supplier** from the drop-down menu.



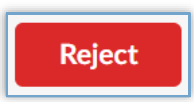


3

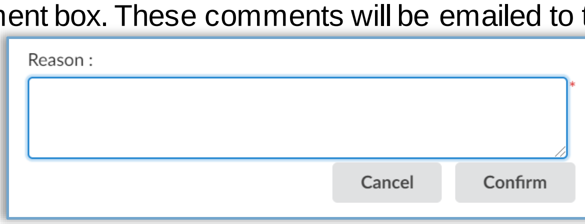
After you have made the appropriate updates to the purchase requisition, if it is justified, click the **Approve** button to send the purchase requisition to the next step in the approval workflow.



If the Requester's purchase requisition is not justified, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.



⚠ If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. These comments will be emailed to the Requester.



APPROVE A PURCHASE REQUISITION (AGENCY FISCAL APPROVER)

Overview

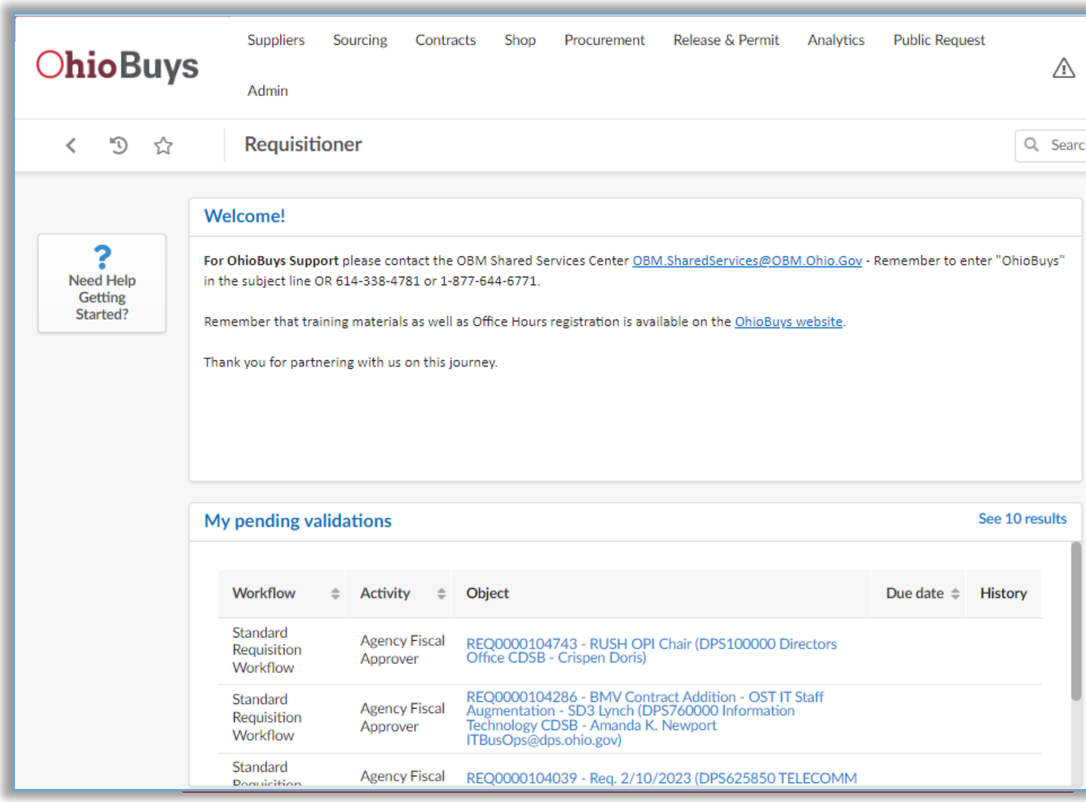
- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Agency Fiscal Approver
- Roles: Agency Fiscal Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

Approve a Purchase Requisition (Agency Fiscal Approver)

Step-by-Step Instructions for Approving a Purchase Requisition

1

Log in to OhioBuys. The My Pending Validations window on the OhioBuys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object hyperlink** for any tasks that have an Action of Agency Fiscal Approver to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click the **Object** name.



2

Review the contents of the purchase requisition to see if a Pcard should be used.

- If the purchase requisition should be a Pcard purchase, you must reject it back to the Requisitioner with instructions to apply their Pcard.

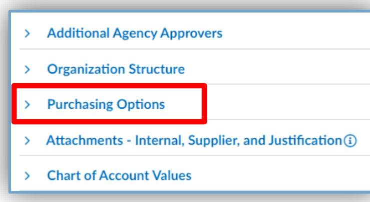
⚠ If the initial Requester's Pcard should be applied, instruct the Requisitioner to also reject the purchase with those instructions contained in their comment to the Requester.

Approve a Purchase Requisition (Agency Fiscal Approver)

Step-by-Step Instructions for Approving a Purchase Requisition

3

In the Header section, click **Purchasing Options** and use the radio button to determine whether or not to encumber the order.



⚠ If a purchase requisition is a Pcard purchase, the Do Not Encumber slider will not appear and OAKS will automatically not encumber the purchase.

4

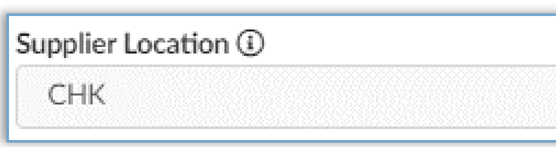
At the bottom of the page under the Items section, click the **Pencil** (✎) icon next to a line item to add or update budget information.

	#	Ref.	Item description	Supplier	Ordered Quantity	Unit	Price	Total	Deliv. date
✎	104286-1	0A1300-72	Service Desk 3 - Christopher Lynch	(OST INC) OST INC	700.00	Hour	38.640	27,048.000	3/15/2023

Note: Budget information is defined at the line item level and is not needed for orders that are not being encumbered (with the exception of account code). If the user has chosen to not encumber the order due to using a funding source not managed in OAKS, they should use the comments field to indicate other pertinent funding information.

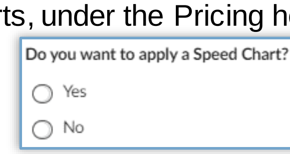
5

Review the **Supplier Location** field. This field auto-populates with the Supplier's default Supplier Location. If you wish to use another option, you must click the **Use Non-Default Supplier Location** Slider.



6

If you wish to add budget information using Speed Charts, under the Pricing header, select **Yes** under the option to apply a Speed Chart.



⚠ For more information on applying speed charts, please refer to the *Applying Speed Charts* Job Aid.

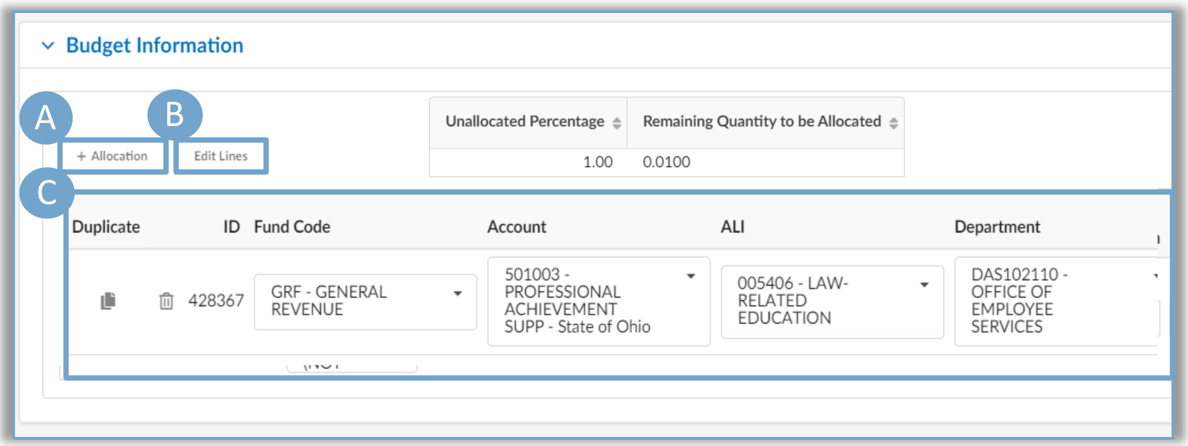
7

Scroll to the bottom of the line item page and click **Budget Information**.

Step-by-Step Instructions for Approving a Purchase Requisition

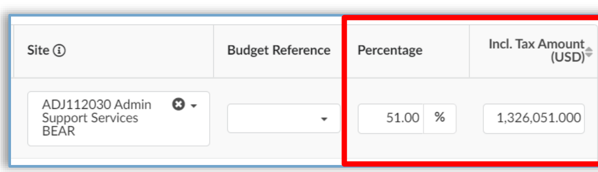
8

Add or update the chartfield information as appropriate.



a. Use the **+Allocation** to create additional chartfield strings for this line item.
b. You can update fields in multiple chartfield strings on a line item by clicking the **Checkbox** ( ) icon to their left and then selecting **Edit Lines**.
c. The chartfield information you enter is the same as what was previously entered in OAKS. Chartfield lines can be duplicated by clicking the **Copy** ( ) icon or deleted by clicking the **Trashcan** ( ) icon.

⚠ How a user allocates their chartfields will depend on the **UOM** selected for the line item. Users should only enter allocations for items with an UOM of **AMT** in the **Incl. Tax Amount (USD)** field. Items with any UOM that is **NOT AMT** should be allocated using the **Percentage** field.



⚠ OhioBuys allows allocations with a degree of precision up to 1/100th of a percent, and when allocating by amount, will round up or down to the nearest 1/100th of a percent.

⚠ A table displaying the remaining percentage/quantity to be allocated is visible at the top of the **Budget Information** section.

⚠ You must update the chartfield information for each line item individually.

⚠ When purchasing from an internal Supplier you must fill in the ISTV Xref field. You must update the Account to an ISTV account code whenever an ISTV Xref is present.

⚠ Account field: Users should click the See All option at the bottom of the dropdown to view only those account codes that are associated with the item's commodity code. (Users will see account codes that may not be linked with the commodity code if they just use the dropdown to select an account code.)

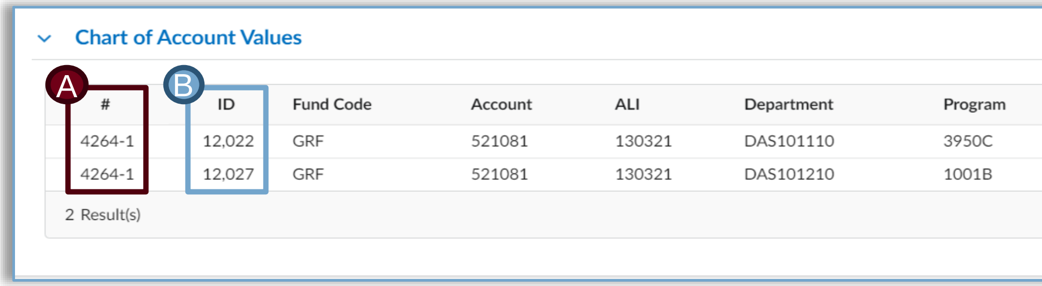
⚠ Beginning with FY24 transactions, populating the Service Location field is mandatory on all purchases. If the budget date on a purchase requisition is on, or after 7/1/2023, Fiscal Approvers will be required to complete the Service Location field before they will be able to submit the purchase requisition.

OhioBuys

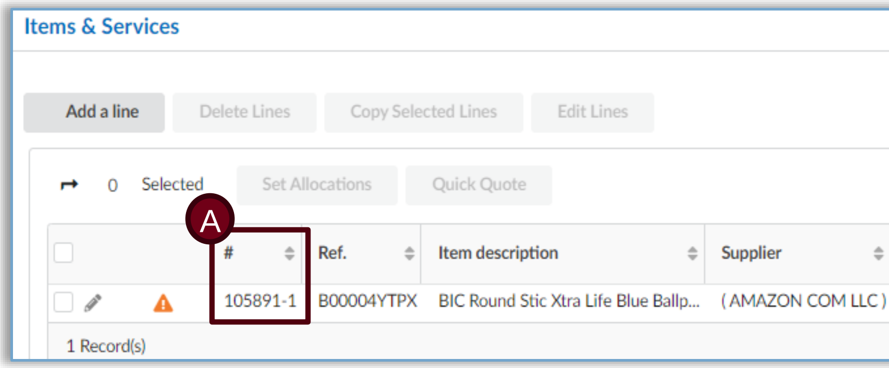
Approve a Purchase Requisition (Agency Fiscal Approver)

Step-by-Step Instructions for Approving a Purchase Requisition

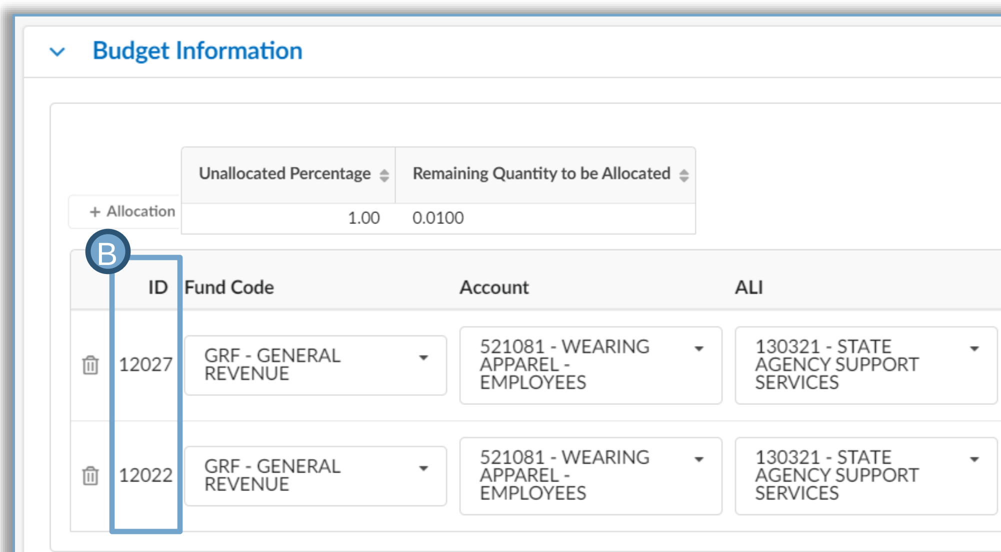
To view all of the chartfield information used in a purchase requisition, users can expand the **Chart of Account Values** section on the requisition header. When reviewing the Chart of Account Values table, please note that



a) The # column will correspond to the # column in the Items grid denoting different line items.



b) The **ID** column corresponds to the unique ID given to each chartfield string (i.e., distribution line) in the line items.



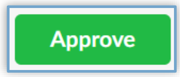
Step-by-Step Instructions for Approving a Purchase Requisition

9

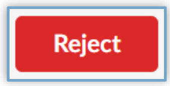
After updating the chartfield information and Supplier Location fields as necessary, click the **Save & Close** button.

10

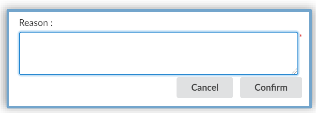
After you have made the appropriate updates to the purchase requisition, and you would like to approve the PR, select the **Approve** button to send the purchase requisition to the next step in the approval workflow.



If the Requester's purchase requisition is not justified, select the **Reject** button. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.

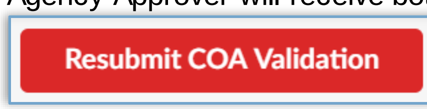


⚠ If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. These comments are emailed to the Requester.



⚠

If COA validation fails, a red **Resubmit COA Validation** button will appear at the top of the purchase requisition and the associated Fiscal Agency Approver will receive both an email notification and a pending validation.



This means that there was an error validating the chartfield information for this PR. Correct the chartfield information, then click **Resubmit COA Validation**. The PR will continue to appear in your My Pending Validations section, and will not advance until the budget has been corrected.

Please note if a purchase requisition fails COA validation, any fiscal approver in your agency for whom the purchase requisition is in scope can edit and resubmit COA validation.

APPROVE A PURCHASE REQUISITION (AGENCY FINAL APPROVER)

Overview

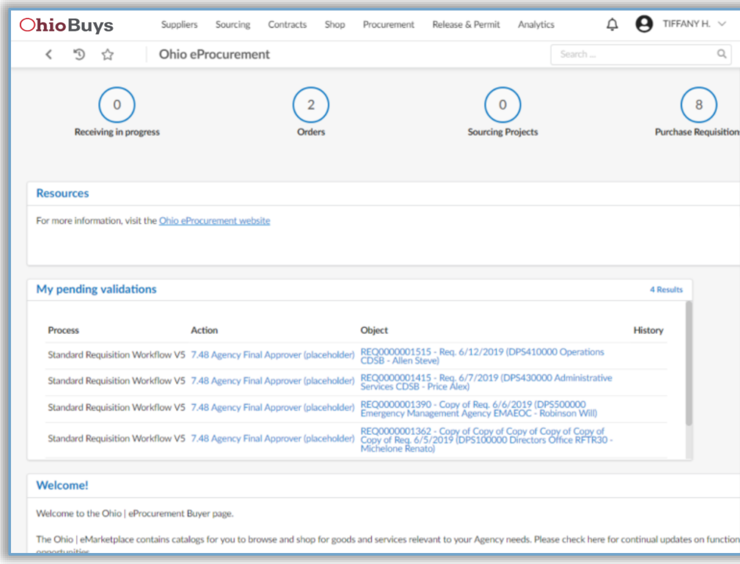
- What's Covered: This section discusses the process of reviewing, updating, and approving or rejecting a purchase requisition as an Agency Final Approver
- Roles: Agency Final Approvers
- Used When: A user receives a notification that a purchase requisition requires their review

Approve a Purchase Requisition (Agency Final Approver)

Step-by-Step Instructions for Approving a Purchase Requisition

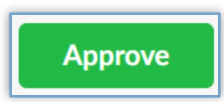
1

Log in to OhioBuys. The My Pending Validations window on the OhioBuys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of Agency Final Approver to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click on the **Object** name.

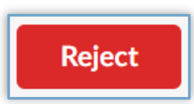


2

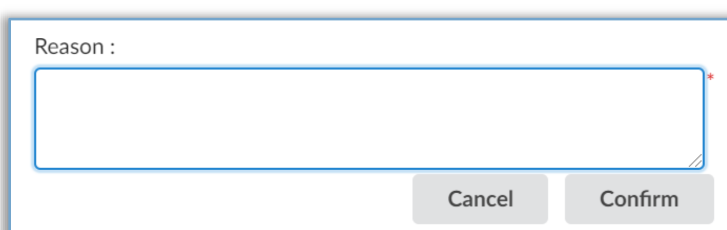
Review the information contained in the purchase requisition. If the requisition is justified and the details are satisfactory, click the **Approve** button to approve it. As the Agency Final Approver, you cannot make any edits to a purchase requisition.



If the purchase requisition is not justified, or any aspect of the purchase requisition requires further revisions, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.



⚠ If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. These comments will be emailed to the Requester.



REVIEW SOURCING DETAILS FOR A PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the process of reviewing a Quick Quote that is associated with a purchase requisition
- Roles: Agency Procurement Approver, Agency Fiscal Approver, Agency Final Approver
- Used When: Reviewing a purchase requisition containing items that required a Quick Quote solicitation

OhioBuys

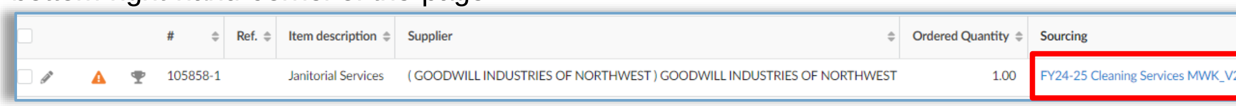
Review Sourcing Details for a Purchase Requisition

Step-by-Step Instructions for Reviewing a Solicitation on a Purchase Requisition

- You can access pricing information that was the result of a quick quote or other type of solicitation directly from the requisition. Please note that the process for accessing, approving or rejecting the purchase requisition remains unchanged
- If the quick quote has been performed incorrectly (e.g., less than three responses, the lowest price was not selected without adequate justification, etc.) please reject the purchase requisition and instruct the Requisitioner to redo the quick quote.
- In order to review a quick quote, you will need to be included on the sourcing project team. If you are unable to access the quick quote please reach out to the user responsible for the solicitation and ask them to add you to the project team as an SME or Contributor. For more information on sourcing project roles, please consult the Creating Managing and Awarding Solicitations Learner Guide.

1

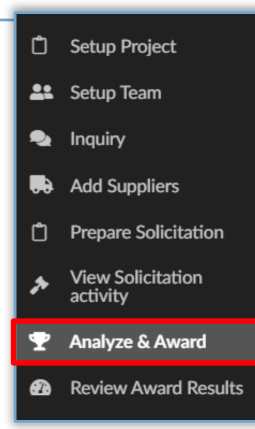
To access a quick quote associated with a purchase requisition, scroll to the bottom of the purchase requisition to review the line item details. Click on the **Sourcing** hyperlink at the bottom right-hand corner of the page.



- Users can click the **Trophy** ( ) icon to see a list of all solicitations associated with that line item in a purchase requisition.

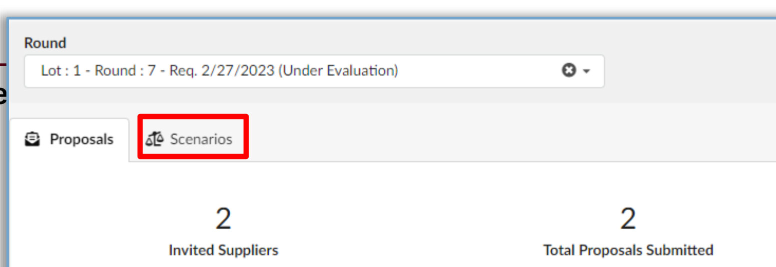
2

Navigate to the **Analyze and Award** tab of the solicitation.



3

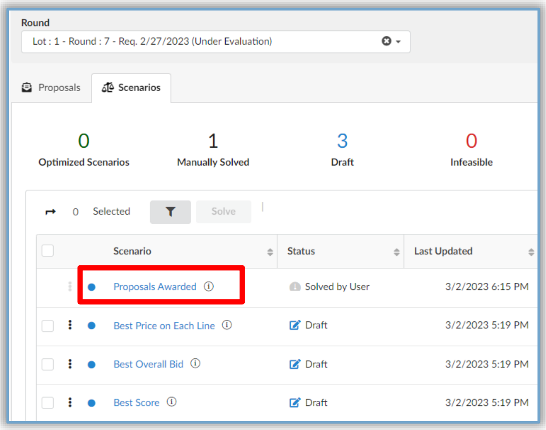
Select the **Sce**

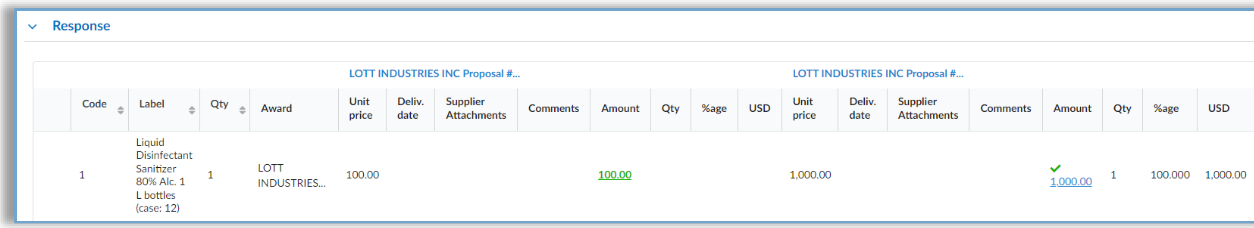


Step-by-Step Instructions for Reviewing a Solicitation on a Purchase Requisition

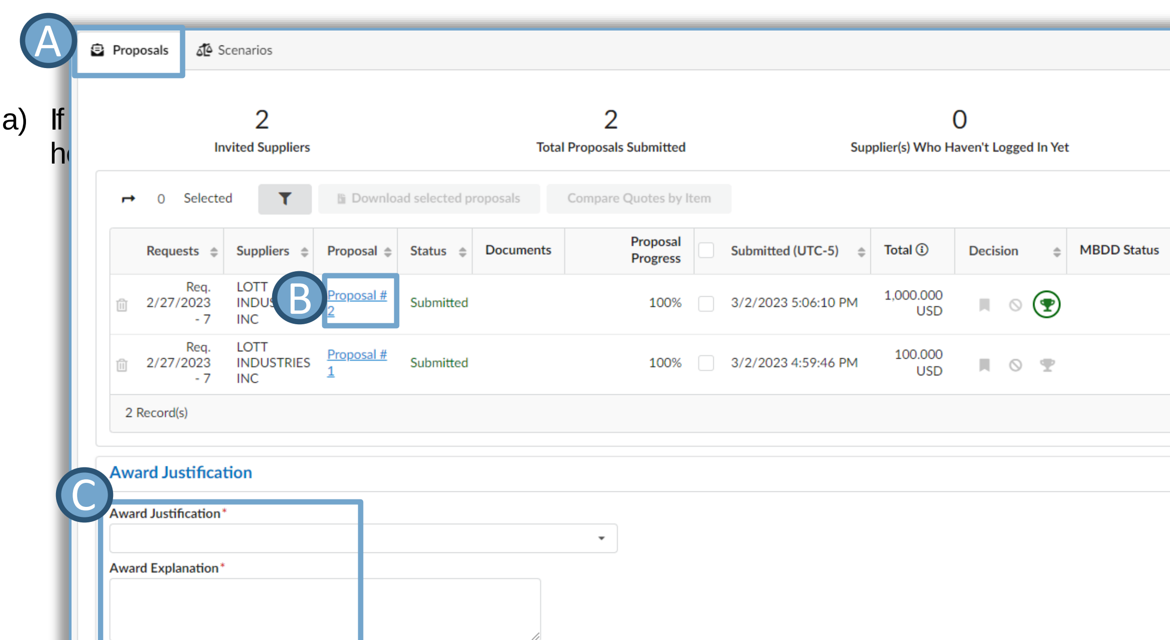
4

Click on the **Proposals Awarded** hyperlink.



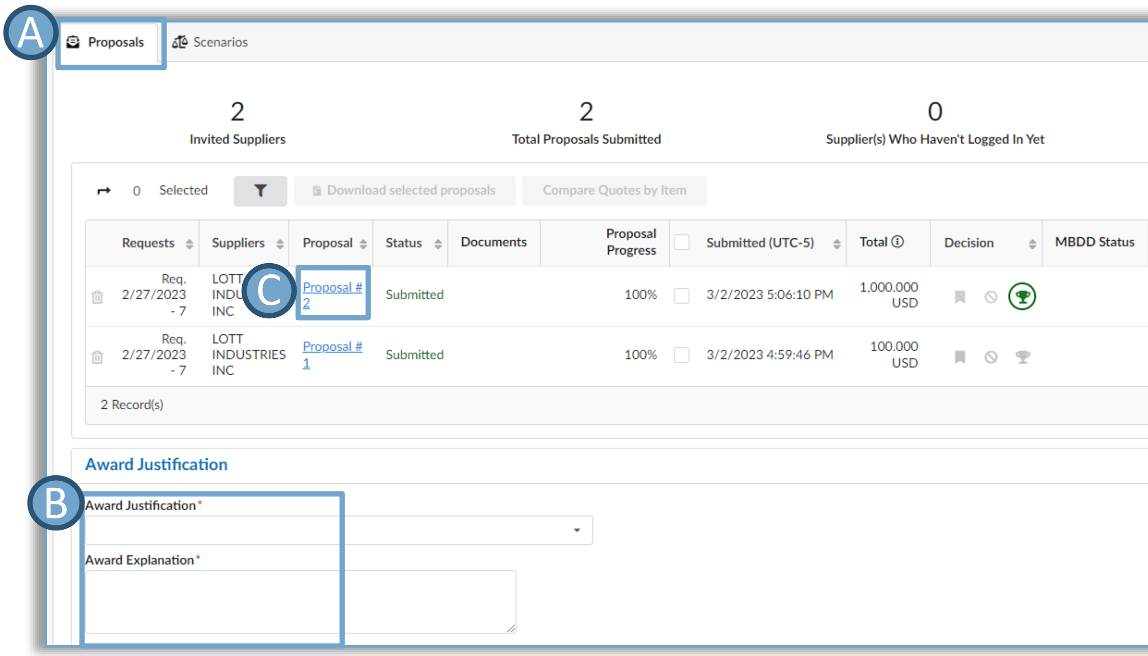


a) If ... ls h...

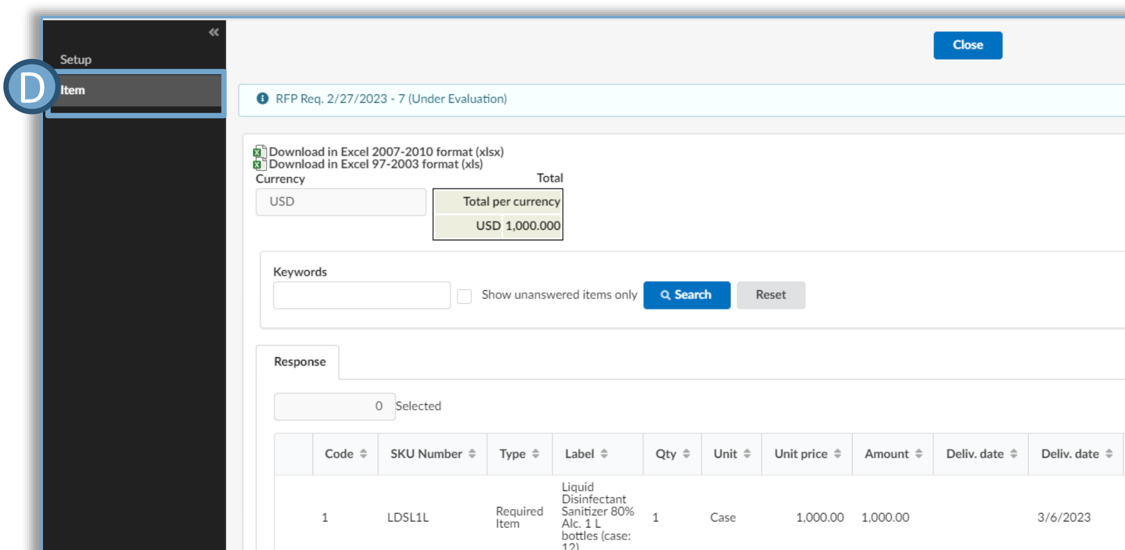


Step-by-Step Instructions for Reviewing a Solicitation on a Purchase Requisition

4



b) Scroll down to review the **Award Justification**.
c) To open a response, click on the associated **Proposal** hyperlink.
d) Navigate to the **Item** tab to view the details of the Supplier's proposal for the requested item.



To return to the original purchase requisition, click the **X** (✖) icon.

⚠ For more information on quick quotes, please consult the Quick Quoting in OhioBuys Learner Guide

MANAGING PURCHASE REQUISITIONS

Topics

- Forward a Purchase Requisition
- Duplicate and / or Cancel a Purchase Requisition

FORWARD A PURCHASE REQUISITION

Overview

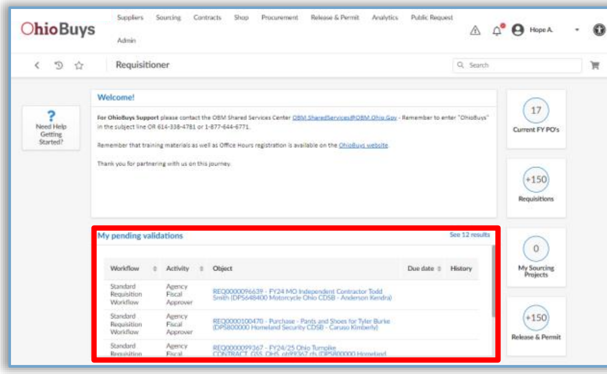
- What's Covered: This section discusses the process of forwarding a purchase requisition to another user for review
- Roles: Requester Supervisors, Agency Procurement Approvers, Agency Fiscal Approvers, Agency Final Approvers
- Used When: An approver needs to obtain an additional, or alternative sign-off on a purchase requisition

Forward a Purchase Requisition

Step-by-Step Instructions for Forwarding a Purchase Requisition

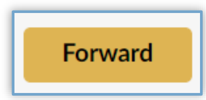
1

Log in to OhioBuys. The My Pending Validations window on the OhioBuys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** that corresponds to your role to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click on the **Object** name.



2

If you determine, based on the details of the purchase requisition, that an additional approver is required at your step in the workflow, select the **Forward** button.

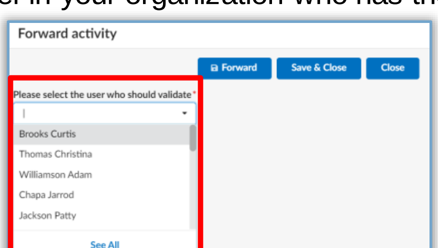


- All approver roles in OhioBuys can forward a purchase requisition for additional approval.

⚠ Note that forwarding a purchase requisition is additive. The requisition is removed from the Pending Validations section of the original user that forwarded the request; however, that user still has the ability to take action on it from the Browse Requisitions page. If either person approves (i.e., the person who was originally assigned this requisition or the person you forward it to), the requisition will move on. If the intent is to make someone else aware of the requisition but not to formally approve it in the system, the non-approver will need to provide any feedback comments outside of OhioBuys.

3

Select the user that you would like to forward the approval to from the dropdown menu. You can forward a PR to any user in your organization who has the Additional Approver role assigned to them.



⚠ If you cannot find a particular user who you believe should be an additional approver on a purchase requisition, please contact your Agency Admin to coordinate and set that user up as an Additional Approver.

Forward a Purchase Requisition

Step-by-Step Instructions for Forwarding a Purchase Requisition

4 Select the **Forward** button.

5 Select the **Save and Close** button.

DUPLICATE AND / OR CANCEL A PURCHASE REQUISITION

Overview

- What's Covered: This section discusses the processes of duplicating or cancelling a purchase requisition in OhioBuys
- Roles: Requesters, Requisitioners
- Used When: It is expedient to copy the information over from an existing purchase requisition / there is a need to cancel an existing requisition

OhioBuys Duplicate and/or Cancel a Purchase Requisition

Step-by-Step Instructions for Duplicating a Purchase Requisition

1

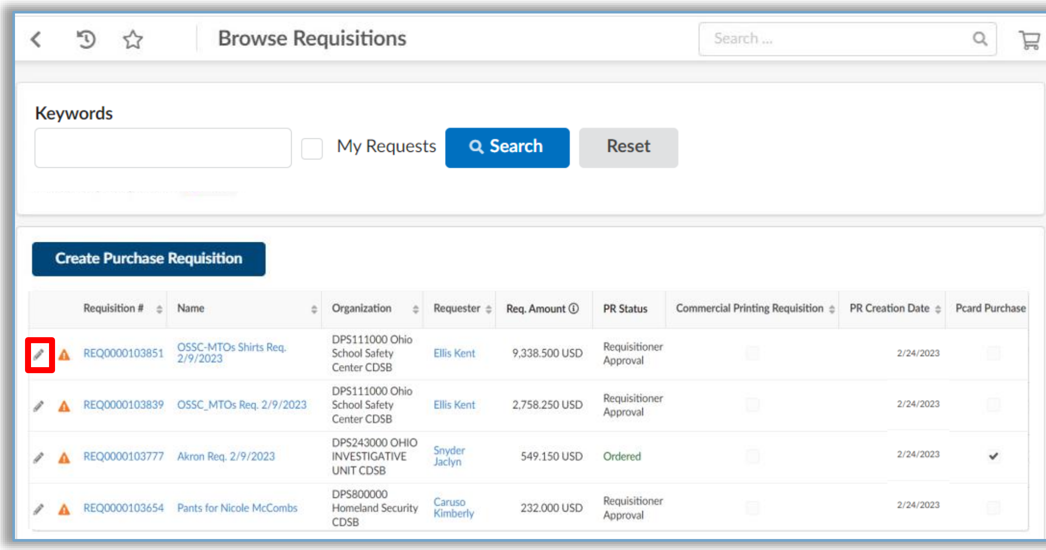
⚠ Purchase requisitions can be duplicated at any point. When a purchase requisition is duplicated, all valid information in the original purchase requisition will be carried into a new draft purchase requisition, with the following exceptions - attachments, Supplier-facing comments, and Pcard details. The new purchase requisition can then be modified and submitted as needed.

⚠ Please note that users cannot duplicate purchase requisitions containing items from punchout catalogs.

Log in to OhioBuys. From the Main Menu Navigation bar, click **Procurement** and select **Browse Requisitions** from the drop-down menu.

2

The Browse Requisitions page is displayed. From this page, you can search for purchase requisitions in your scope. Click the **Pencil (✎)** icon next to the purchase requisition you would like to duplicate.



3

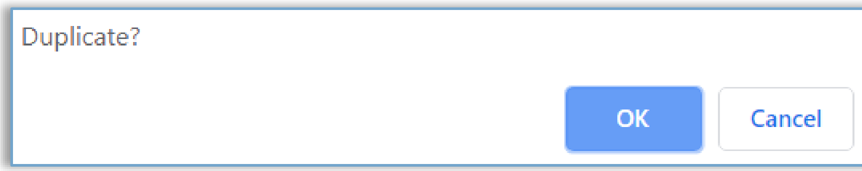
Review the details of the purchase requisition.

a) If the purchase requisition is in a status of Initialized, click **Other Actions**. Select **Duplicate** from the drop-down menu. Click **OK** to confirm.

Step-by-Step Instructions for Duplicating a Purchase Requisition

3

b) If the purchase requisition is in a status of Ordered, click **Duplicate**. Click **OK** to confirm.



4

All of the valid items from the original purchase requisition have been duplicated into a new draft requisition. Make updates to the displayed information as necessary and then submit the requisition for approval.

SEND A REQUISITION DOCUMENT FOR SIGNATURE USING ONESPAN SIGN

Overview

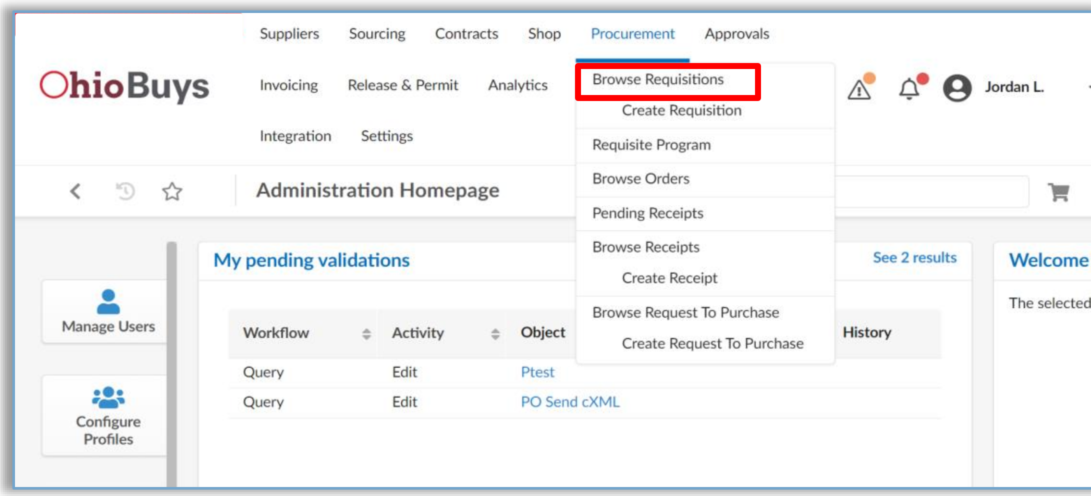
- What's Covered: This section walks through the process of sending a document associated with a requisition for electronic signature using OneSpan Sign.
- Roles: Requesters, Requisitioners
- Used When: A document associated with a purchase requisition needs to be routed for an electronic signature using OneSpan Sign

Send a Requisition Document for Signature Using OneSpan Sign

Step-by-Step Instructions for Sending a Requisition for Signature

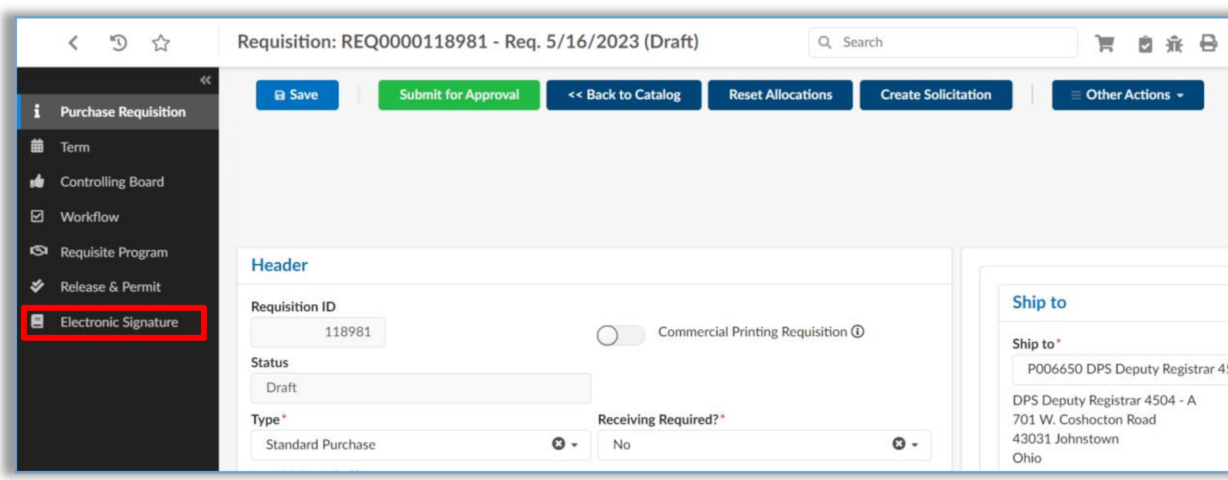
▲ Before attaching a document to a requisition and routing for electronic signature, agencies should consider whether it's more appropriate to create an agency-administered contract in OhioBuys and route associated documents for signatures (e.g., setting up a Memorandum of Understanding with another agency).

1 Log in to OhioBuys. From the Main Menu Navigation bar, click **Procurement** and then select **Browse Requisitions**.



2 Click the **Pencil** ( ) icon next to the purchase requisition you would like to open.

3 Navigate to the **Electronic Signature** tab.

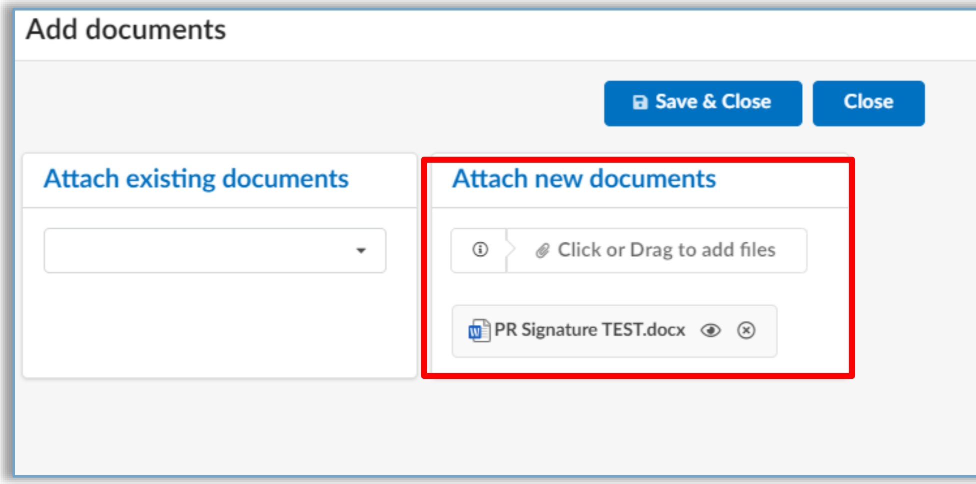


4 Click **Create a new Signature Transaction** to start the OneSpan Sign process.

Step-by-Step Instructions for Sending a Requisition for Signature

5 In the Documents header, click +**Add documents**.

6 In the pop-up window, click the **Attachment** ( ) icon or drag the document(s) to upload for signature in the **Attach new documents** section.



7 Click **Save & Close**.

8 Click **Launch Signature Process** to begin the OneSpan Sign process.

You will automatically be redirected to OneSpan Sign.

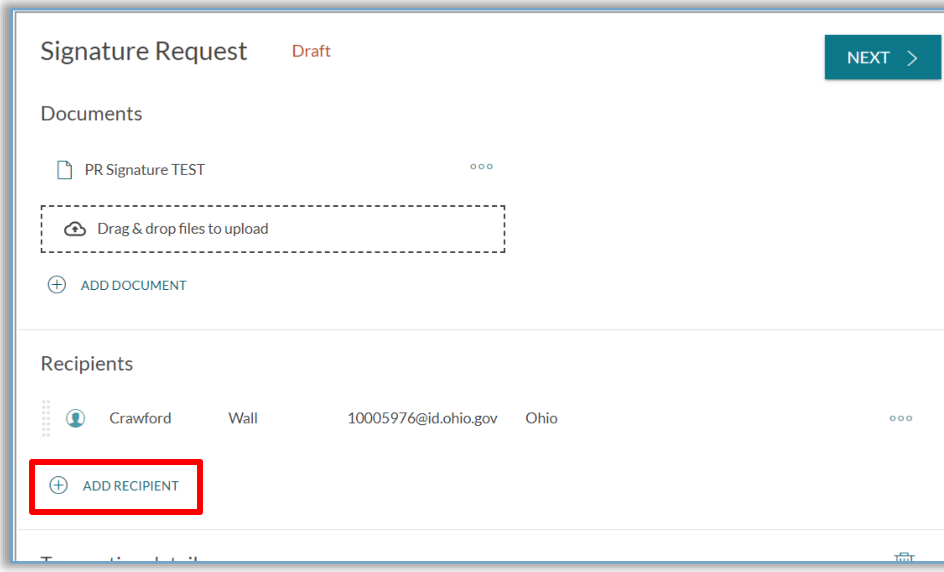
- ⚠ If your internet browser is configured to block pop-ups, then you will need to turn off your pop-up blocker and perform this step again.
- ⚠ There is a limit of 16 MB for files being packaged in a OneSpan Sign transaction; if users have multiple files that total more than 16 MB, the documents should be sent in separate individual signature transactions.

Send a Requisition Document for Signature Using OneSpan Sign

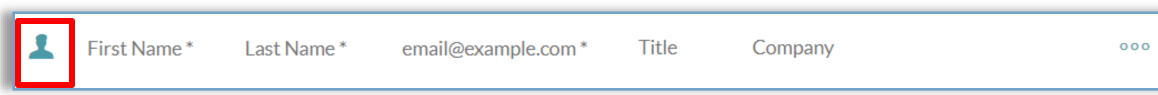
Step-by-Step Instructions for Sending a Requisition for Signature

9

Once inside of OneSpan Sign, you will need to add recipients. These individuals will be everyone that needs to sign the document within the State and on the Supplier side. By default, you will be added as the first recipient. To add additional recipients, click **+ Add Recipient**.

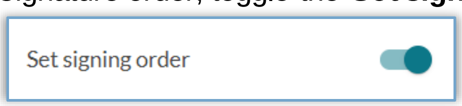


10

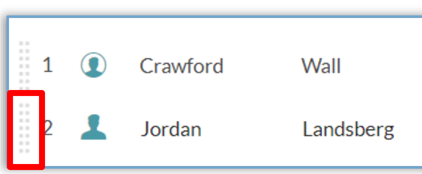


Enter the recipient's **First Name**, **Last Name**, **Email Address**, **Title**, and **Company**. All recipients will receive access to complete their signatures via email.

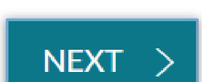
- To add additional recipient details, or to remove a recipient, click the **Ellipses** (°°°) icon
- To manually assign the signature order, toggle the **Set signing order** radio button.



- If the **Set signing order** button is engaged, users can click and drag to the left of users' names to move them up or down in the signing order. Note that the purchase requisition will not go to the second user until the first user has signed, and will not go to the third user until the second user has signed, etc.



Once all recipients have been added, and the signing order has been documented as applicable, click **Next**.



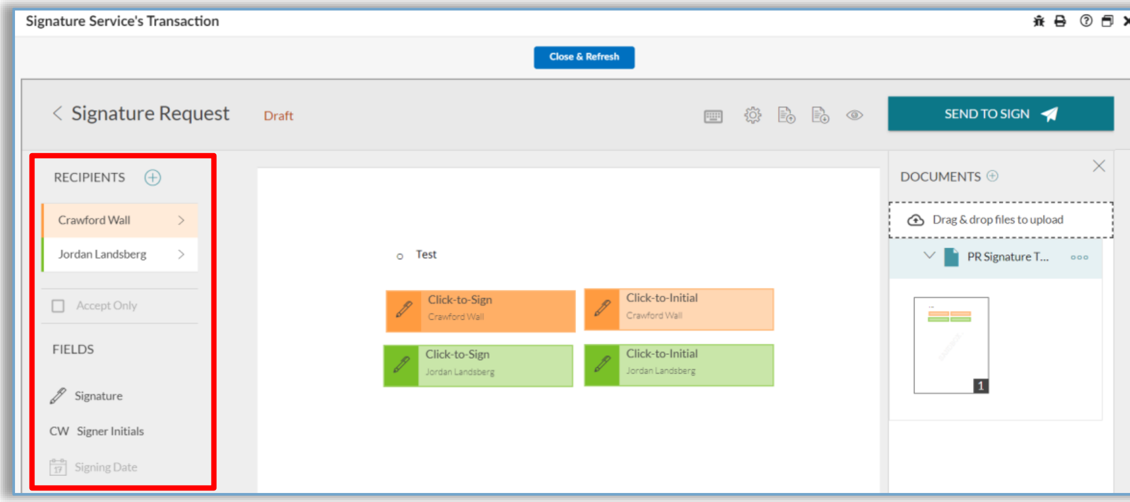
Send a Requisition Document for Signature Using OneSpan Sign

Step-by-Step Instructions for Sending a Requisition for Signature

11

After adding all of your recipients, you will need to add the signature fields. To add a signature field:

a) Select the name of the recipient that should sign.
b) Select the type of field you would like to add (e.g., Signature, Signer Initials, Signing Date, etc.)
b) Drag and drop the field on the area of the purchase requisition where you would like the user to add this information.



- Each field will be color coded to match the color for each recipient.
- Fields can be re-sized to fit the area allotted within the purchase requisition document.

12

After inserting all of the correct fields, click the **Send to Sign** button and confirm by clicking **Send**.

- An email will be sent to each recipient with a link to the purchase requisition. The order of these emails will be based on the recipient order that was established for the purchase requisition.

Active signature transactions can be tracked in the **Electronic Signature** tab.

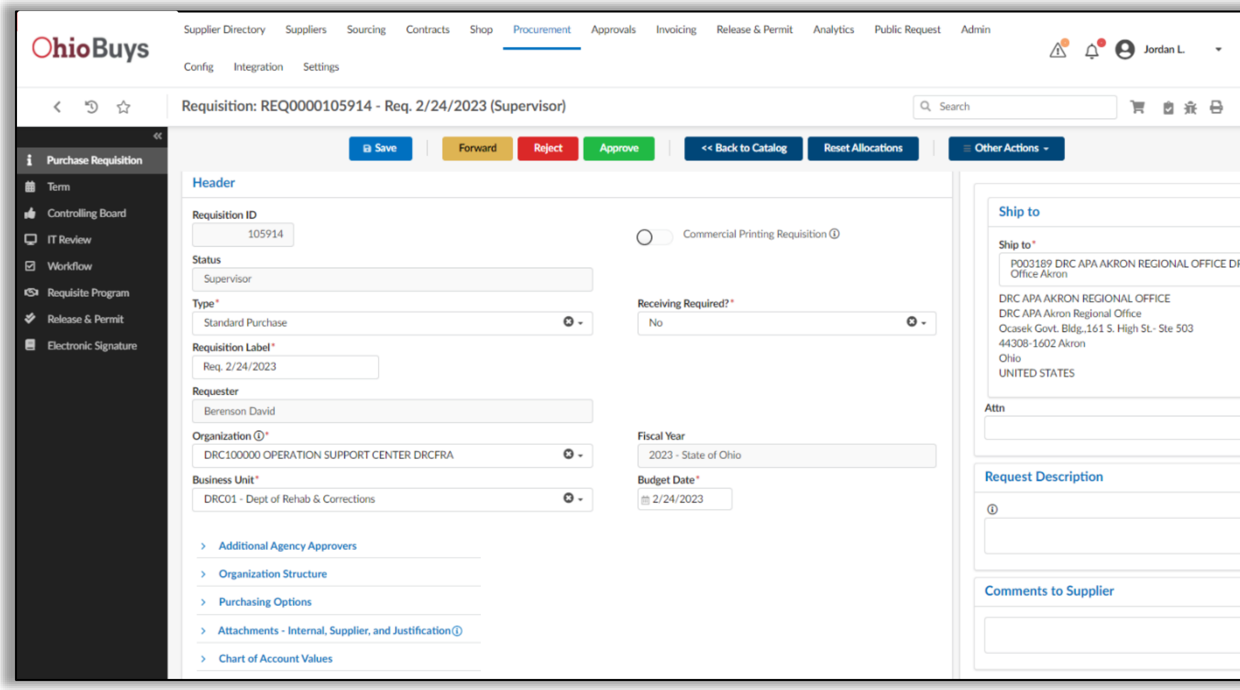
Created on (UTC-4)	Documents	Signers	Status	Submission Date (UTC-4)	Created by	Launched by	Remote Status	Completed on
5/24/2023 10:30:07 AM		Wall Crawford Landsberg Jordan	Finalized	5/24/2023 10:32:14 AM	Wall Crawford	Wall Crawford	COMPLETED	• 5/24/2023 • 5/24/2023

Please note, the Electronic Signature tab does not update automatically. To check the status of a purchase requisition signature, click the **Refresh** ( ) icon.

After signing through OneSpan is complete, you may wish to store a copy of the signed purchase requisition. To download the purchase requisition, click the **PDF** ( ) icon.

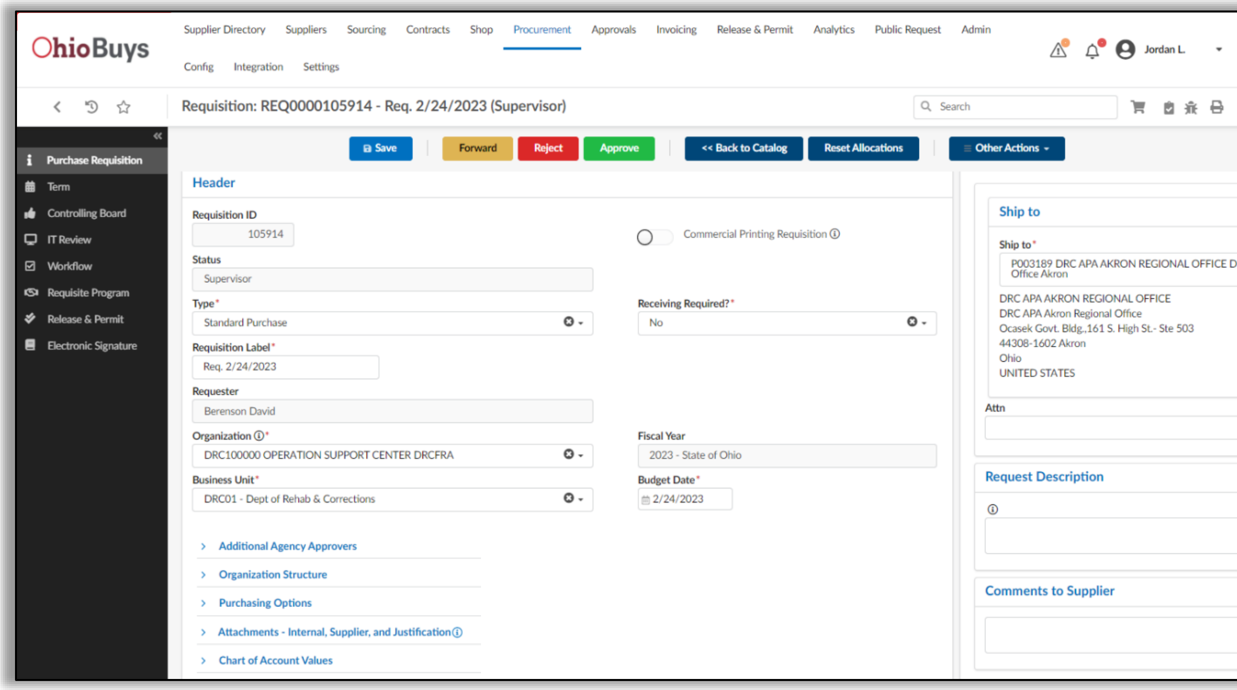
PURCHASE REQUISITION FIELD GUIDE

Requisition Field Guide: Requisition Header (1/2)



Object	Definition	Additional Info
Additional Agency Approvers	Expands when selected to display a field where users can indicate any Additional Agency Approvers for that purchase requisition. Note that only users with the Additional Agency Approver role may be selected in this field.	
Attachments - Internal, Supplier, and Justification	Expands when selected to display a button where users can upload attachments for both internal use and Suppliers. Most file formats are supported	
Attn	The person who will be responsible for receiving the items in the purchase requisition	Also available at line item level
Bill to	The address to which the Supplier will bill for the purchase requisition	Mandatory field
Budget Date	By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.	Mandatory field
Business Unit	The Business Unit that the purchase requisition is for, usually the Requester's agency	Mandatory field
Chart of Account Values	Expands to display all COA strings used on the purchase requisition	
Comments to Supplier	A free text entry field where users can input comments that will be visible to the Supplier	Also available at line item level
Fiscal Year	The fiscal year that the purchase requisition falls under, populates automatically based on the Budget Date after the purchase requisition is saved	Non-editable
Organization	The division or site that the purchase requisition is for	Mandatory field
Organization Structure	Expands when selected to display more information about the organization that the purchase requisition is for	

Requisition Field Guide: Requisition Header (2/2)

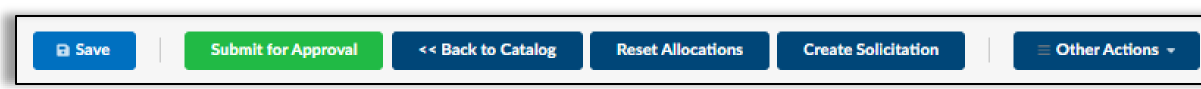


Object	Definition	Additional Info
Purchasing Options	Expands when selected to display buttons for: Single Source, Sole Source, Put PR on Hold, Do Not Encumber, Request DAS to Source, or indicate request is related to sudden and accidental direct property damage	
Request Description	A free text entry field where users can add additional information about the purchase requisition that will be visible to State users (e.g., justification)	
Requester	The user that the purchase requisition is for, this field generally populates with the name of the user who creates the purchase requisition, however some users have the ability to purchase on behalf of other users and should indicate the recipient of the purchase here	
Requisition ID	An automatically assigned ID number that can be used to find the requisition	Non-editable
Requisition Label	The name of the requisition in OhioBuys	Mandatory field
Ship To	The address to which the Supplier will ship the purchase assuming that all items are going to the same location	Mandatory field Also available at line item level
Status	The status of the purchase requisition which updates automatically, some common statuses include: Draft, Initialized, and Ordered	Non-editable
Type	A selector where users can indicate that a requisition is either Standard, After the Fact, or a Blanket/Encumbrance Order	Mandatory Field

Requisition Field Guide: Requisition Header Item View

Object	Definition	Additional Info
Add a line	Click to add a new blank line item to a purchase requisition	
Copy Selected Lines	After selecting a line(s) using the checkbox(s) to the left, click to create copies of the selected lines	
Delete Lines	After selecting a line(s) using the checkbox(s) to the left, click to delete the line items	
Edit Lines	After selecting a line(s) using the checkbox(s) to the left click to open and edit the line item	
Line Item	An item contained in the purchase requisition, displays certain information about the line item in a table (discussed in more detail on the next page)	Additional fields visible offscreen
Pencil Icon	Click to open a line item and view it in more detail	
Sourcing Project Link	Click to view the Sourcing Information and sourcing tab for a requisition	
Trashcan Icon	Click to delete a line item	
Trophy Icon	Click to view a list of all solicitations associated with that line item in a purchase requisition.	

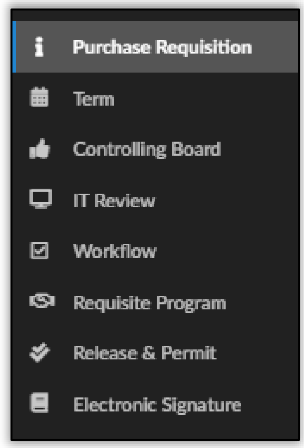
Requisition Header Buttons



Object	Definition	Additional Info
Back to Catalog	Returns to the Browse Items page of OhioBuys	
Create Solicitation	Initiates a Solicitation	
Other Actions	Provides the options to duplicate or cancel a requisition	
Reset Allocations	Resets any chartfield information that has been entered	
Save	Saves any changes made to the purchase requisition	
Submit for Approval	Submits a purchase requisition and initiates the appropriate approval workflow	

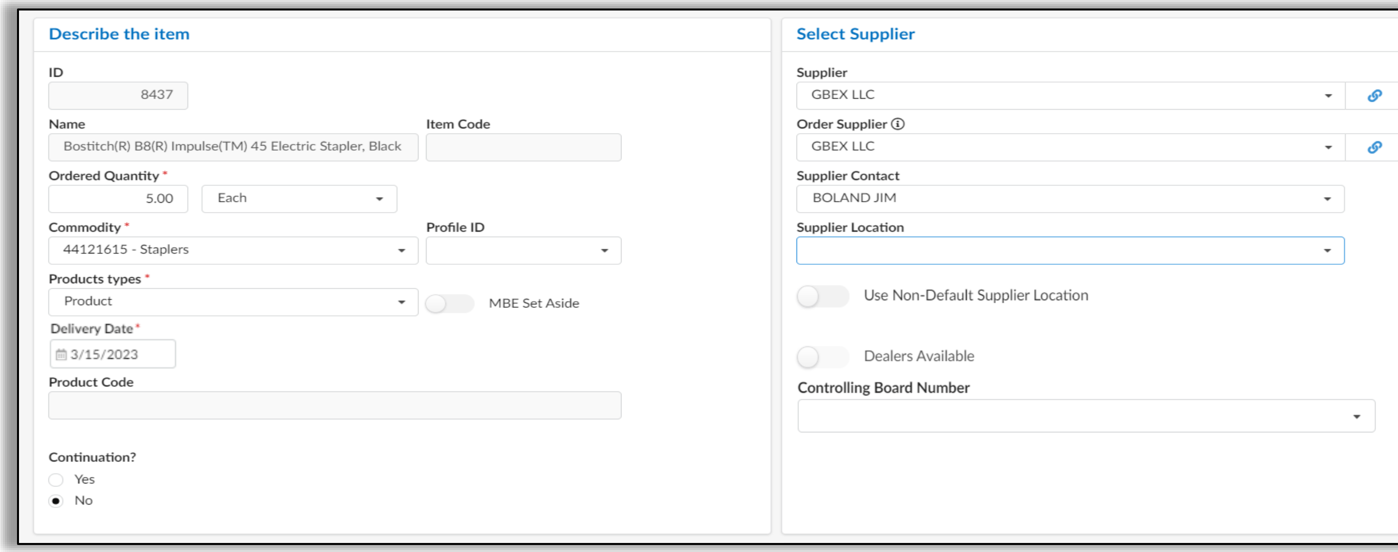
Requisition Field Guide: Requisition Header

Purchase Requisition Tabs



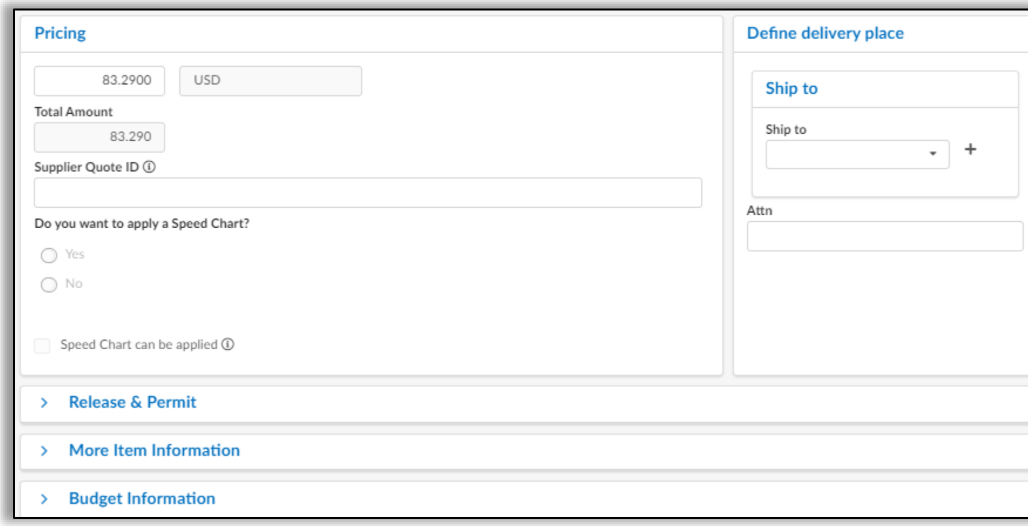
Object	Definition	Additional Info
Purchase Requisition	In this tab, users can view and edit most of the details about a purchase requisition including the and line items	
Term	If the purchase requisition is for items that will be operating under a schedule or term, users should open this tab and complete the details onscreen. (for more information, please refer to the *Create a Blanket Order* Job Aid and *Add Subscription or Milestone Terms* Job Aid)	
Controlling Board	The tables displayed in this tab provide detail around any relevant controlling board waivers associated with a purchase requisition, as well as depicting relevant Direct Purchase Authority and spending thresholds	
IT Review	If the purchase requisition requires IT approval, the comments from those approvers will be displayed here	
Workflow	Displays a detailed workflow that indicates where a purchase requisition is in the process of becoming an order, boxes highlighted in green are complete while those highlighted in orange are in progress	
Requisite Program	If the purchase requisition is for a commodity that is offered by a requisite procurement program, the progress of obtaining any necessary waivers from Requisite Procurement Agencies will be displayed here.	
Release & Permit	If the purchase requisition requires a Release & Permit, the Release and Permit information will automatically populate here once it has been granted	
Electronic Signature	In this tab, users can leverage OneSpan to sign requisition documents. This option will be editable until final approval, and the only roles that have access to create a signature on this tab will be Agency Final Approvers, Requisitioners, Agency Procurement Approvers and Agency Fiscal Approvers (read only for all other profiles except State Administrators)	

Requisition Field Guide: Line Item (1/2)



Object	Definition	Additional Info
Commodity	The commodity code associated with the line item	Mandatory field
Continuation?	Click **Yes** if this is a continuation of a previous order, else leave as **No**	
Controlling Board Number	If a controlling board number needs to be applied to a purchase requisition, it will populate here	
Dealers Available Slider	If there are dealers available for this line item, this slider will automatically engage (indicates a quick quote must be performed)	
Delivery Date	The requested delivery date for the line item (must be set by the user)	Mandatory field
ID	A unique ID is assigned to each line of every purchase requisition	Non-editable
Item Code	The unique code assigned to an item by its Supplier (applies only to hosted catalog items)	Non-editable
MBE Set Aside Drop-Down	Click to select if the item is MBE or EDGE compliant	
Name	The name of the line item	Only editable for freeform items
Order Supplier	The specific location of the Supplier that will fulfill the purchase requisition	
Ordered Quantity	The quantity of items ordered, can be modified to be measured in different ways such (e.g. each, box, bag etc.)	Mandatory field
Product Code	A unique value provided by some Suppliers in their catalogs	Non-editable
Products Types	States whether the line item is for a Product or a Service (currently only product can be selected, however Services may be ordered in OhioBuys)	Mandatory field
Profile ID	Used for asset management	Non-editable
Supplier	The Supplier for the line item	
Supplier Contact	The primary point of contact for the line item, Supplier Contacts are determined at the Order Supplier level	
Supplier Location	How the Supplier is paid, defaults to the Supplier's preference in OAKS	
Use Non-Default Supplier Location	Click if you are using a Supplier location other than the default in OAKS	

Requisition Field Guide: Line Item (2/2)



Object	Definition	Additional Info
Attn	The person who will be responsible for receiving this line item in the purchase requisition	Also available at the Header level
Budget Information	Click to expand, displays where to enter chartfields and allocations	
Do you want to apply a Speed Chart?	If your agency utilizes speed charts, click **Yes** and you will be presented with options to apply them, otherwise leave as **No**	
More Item Information	Click to expand, displays additional item information such as the Product (if from a hosted catalog), and contract information	
Pricing	The price of one unit of the line item	Mandatory field when creating a freeform line item
Release & Permit	Click to expand, if a Release and Permit is applied to the line item its information will be displayed here	
Ship To	Where the item will be shipped, different Ship To addresses can be applied to each line item across a purchase order and override the header level Ship To address	Also available at the Header level
Supplier Quote ID	If utilizing a unique price, the Quote ID from the Supplier should be input here (note that when completing a quick quote this field will be populated automatically once prices are updated)	
Total Amount	The total cost of the line items	Non-editable, updates based on price and quantity

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0		Initial draft	All
2.0		Updated Pcard process	All
3.0	6/15/2020	Updated Receiving Required and Additional Agency Approvers	27, 33, 42, 50, 60, 74
4.0	7/24/20	Updates related to Release 2 Sprint 7	43, 52, 61, 79, 98
5.0	8/6/20	Updates related to Release 2 Sprint 8	72, 83, 94
6.0	8/21/20	Added after the fact purchase requisition clarification	32
6.1	9/3/2020	Added details on how to copy allocation lines	88
6.2	1/6/2021	Fixed a misspelling	62
6.3	2/3/2021	Added Review a Solicitation JA for Approvers	92-94
6.4	3/1/2021	Added language about filtering by Supplier or Contract Number. Updated language on Chartfields based on State Requests	26, 32, 48
6.5	3/15/2021	Added language for Product Reference Codes being added to the Advanced Filter from the Browse Items page.	8, 9, 26, 32, 41
6.6	5/10/2021	Added clarification on Budget Date	34, 44, 54, 64, 105

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
6.7	5/25/2021	Added reference to new Chart of Account Values section on PR Header, also noted the field in the Field Guide	38-39, 49-50, 59-60, 71-72, 92-93, 110-111
6.8	6/6/2021	Added Manufacturer Part Number field to search pages. Updated Apply Order Supplier/Contact to All Line Items button to explain how this button will also apply the selected Delivery Date and Attn fields to all line items	26, 29-30, 32, 36, 42, 47, 57, 69
7.0	6/14/2021	Removed General Navigation content. Added details on how and when to associate a contract with a freeform line item	50, 52
7.1	7/6/2021	Updates for On Behalf Of Process. New page on multiple agency approvals. Added a note stating the Delivery Date field will not be shown if the Product Type= Services	11, 31, 41, 51, 53, 62
7.2	7/21/2021	Noted Requesters cannot edit a PR once it's been submitted. Explained users should not re-open canceled/deleted PRs	17, 95
8.0	8/10/2021	New slides on how to start the Purchase Requisition Process. Minor updates to wording and removal of specific slide references on Services slide.	11-19, 20

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Version	Publish Date	Summary of Updates	Pages Updated
8.1	8/11/2021	Process updates on adding quotes as justification documents, updating generic line items to variable pricing, Updates to process for changing freeform requisition to hosted catalog requisition, Updates to PCard JA intro, Updates to process for selection a supplier before searching for a contract when starting the PR process	11, 16, 18, 28, 75
8.2	8/17/2021	New page on Continuation purchases	70
8.3	8/31/2021	New page on Negative Line Items	71
8.4	10/8/2021	Updated new Ohio Buys logo	Entire document
8.5	12/2/2021	Updated rejection step	79
8.6	1/5/2022	Added steps to duplicate a chartfield line, split out some pages	34, 45-46, 56-57, 69-70, 94
8.7	2/9/2022	Add in callouts for Pcard purchases and freeform requisitions	28, 63
8.8	3/14/2022	Added new information concerning search items enhancements (Manufacturer part, index number, etc.)	12,22,28,38,50,61

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Version	Publish Date	Summary of Updates	Pages Updated
8.9	4/27/2022	Added new information concerning PRs referencing contracts with status “awaiting effective date”	19,30,41,52,65, 112
9.0	5/25/2022	• Replaced screenshots showing EOD with MBDD • Noted that users should not duplicate PRs containing items from Punchout catalogs • Noted Order Supplier may populate automatically	• 15, 17, • 107 • 25, 33, 44, 55, 68
9.1	6/17/2022	• Updated the Pcard purchase limit to $5,000 instead of $2,500	28
9.2	8/2/2022	• Updated the PR LG to remove the Origin Code from screenshots and descriptions	All
9.3	8/31/2022	• Removed notes detailing the ability to make future dates POs for another fiscal year – both encumbered and non-encumbered POs for future years can be created.	41,52,65

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Version	Publish Date	Summary of Updates	Pages Updated
9.4	9/22/2022	• Added details on adding a Pcard to a user's profile • Added instructions that for users with multiple Pcards they need to apply one • Removed language about routing to approvers after Additional for Pcard purchases • Clarified that after additional approvers, the order is processed into a PO in the case of Pcard orders • Added a note for users who need to add controlling board # to Pcard purchase • Added a note that chartfields are optional for Pcard purchases	• 9 • 36 • 29 • 40, 51, 64 • 33 • 34
	9/28/2022	• Instructed users to refrain from using a combination of UOM "each" and quantity "1" in freeform items.	• 62
	9/28/2022	• Noted that Requester Supervisors and Additional Agency Approvers have edit capabilities	• 84, 87
9.5	10/18/2022	• Added a note that allocation information must align with the associated UOM • Noted Service Location requirement for FY23	• 45, 56, 62, 69, 94 • 94

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Version	Publish Date	Summary of Updates	Pages Updated
9.6	12/22/2022	Added notes on capital purchasing	2, 21
9.7	01/18/2023	Added notes on travel and capital purchasing	21, 22
9.8	2/2/2023	Added note on process for obtaining R&P	77,78,79
9.9	4/19/2023	Corrections to MBE section on Freeform PR	62
10.0	5/8/2023	Revised based on the 2023 OhioBuys Upgrade	All
10.1	5/10/2023	Revisions to chartfield entering	36, 37, 47, 48, 57, 58, 68, 69, 96, 97
10.2	5/23/2023	Added a section on starting the OneSpan Sign process for Purchase Requisitions	112-116